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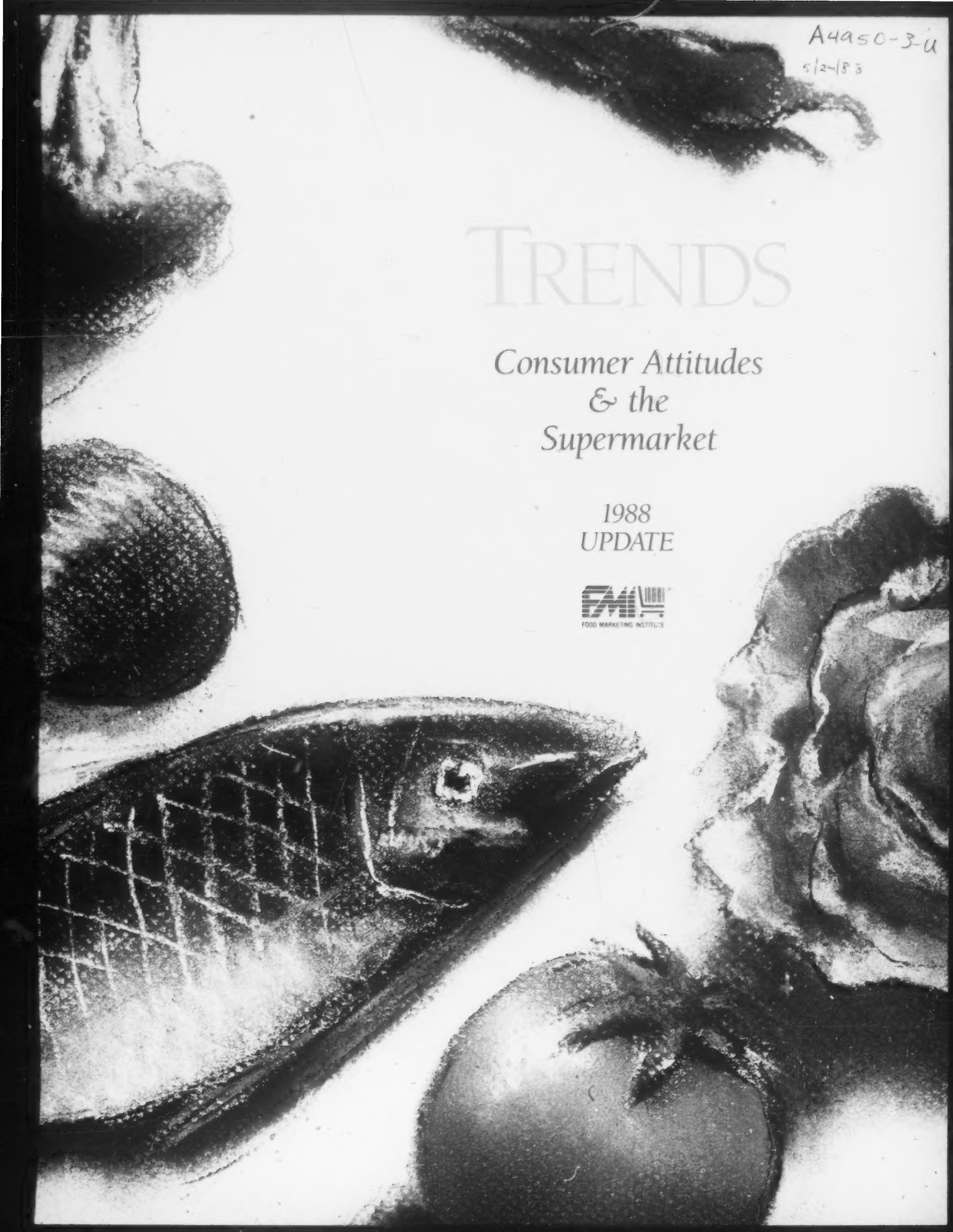

# TRENDS

## *Consumer Attitudes & the Supermarket*

*1988 UPDATE*

FMI
FOOD MARKETING INSTITUTE

# TRENDS

## CONSUMER ATTITUDES AND THE SUPERMARKET

**1988**

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The Food Marketing Institute (FMI) is a non-profit association conducting programs in research, education and public affairs on behalf of its 1,500 members—food retailers and wholesalers and their customers in the United States and overseas. FMI's domestic member companies operate approximately 17,000 retail food stores with a combined annual sales volume of $180 billion—more than half of all grocery sales in the United States. Most of FMI's membership is composed of independent supermarket operators or small regional firms. Its international membership includes more than 150 members from 43 nations.

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# INTRODUCTION

The present study is the seventeenth in a series of consumer attitudes surveys begun in 1974 by the Food Marketing Institute. Designed to identify the changing needs and priorities of the American consumer, *Trends—Consumer Attitudes and the Supermarket, 1988* explores the major issues and trends from previous years, while probing new issues that are likely to capture the attention of consumers over the next several years.

This year's study continues the previous emphasis on shopping behavior and attitudes, and nutrition and food safety. It presents a comparison with previous years' data wherever possible. The main areas of interest include:

- Expectations and evaluation of supermarket performance.
- Suggested improvements to supermarkets.
- Measures used to economize and save time while shopping.
- Buying habits and shopping behavior.
- Attitudes toward nutrition and food safety.
- Changes in food preparation behavior.
- New products and services for supermarkets.

Additionally, this year's *Trends* investigates the issue of service at the supermarket, focusing on:

- What constitutes good service.
- Consumers' evaluations of supermarket service.
- Changes in service over time.

A demographic profile of the total sample, including weighted and unweighted percentages of major demographic groups, appears in the methodology section of this report.

## Study Design

The data for this survey are based on telephone interviews with a representative, nationwide sample of 1,019 male and female supermarket shoppers conducted in January, 1988. The sample was designed to be composed of 60 percent female and 40 percent male heads of households. It was subsequently weighted to an 80 percent female and 20 percent male ratio to maintain comparability with previous studies in the *Trends* series.

## A Note on the Tables

Presented directly beneath the title of each table is a description of the base — that is, the group of respondents for each question. The exact number of respondents in this base group, either in total or for shopper categories, is provided for all non-trend tables. The percentages shown in each table are calculated using this base number. It should be noted that these percentages may not add up to 100 percent due to rounding or the acceptance of multiple responses.

In all instances where comparisons are made between categories surveyed in 1988, any noted differences are statistically significant. For time-series data, whether for types of consumer or totals, changes are simply noted and are not subject to statistical comparison, unless otherwise stated.

For some tables, the response categories are presented both separately (e.g., very close, somewhat close) and combined (e.g., very close or somewhat close). In some instances, the separate percentages may not add up to the combined percentages due to rounding.

For each table the wording of the question as it was asked this year is provided. Any changes in wording from previous years are noted in the table.

# SURVEY HIGHLIGHTS

The following is an overview of some of the most important findings of *Trends 1988.*

## Expectations and Evaluation of Supermarket Performance

- Generally, shoppers indicate high levels of satisfaction with the overall performance of their supermarkets, and with the service provided (Tables 4 and 38). Two shoppers in five believe the service at their supermarket has improved over the last year or two, while half believe the service has remained the same (Table 39). Shopper satisfaction with the service provided is the best indicator of their overall satisfaction with the supermarket.
- Factors that are most important to a shopper's decision to select a particular supermarket include quality produce, fruits and vegetables, variety or wide selection, quality meat, low prices, courteous employees, a convenient location, and readable and accurate shelf tags. Many of these factors are the same as those identified with good service (Tables 1 and 37).

## Suggested Improvements to Supermarkets

The most popular suggested improvements to supermarkets involve additional services and methods that enable consumers to find items more efficiently (Table 5). These include:

- Special indicators on product displays to indicate "best buys."
- Store maps to indicate where items are located.
- Clerks who put bags in your car.
- An in-store bank.

## Economizing and Time-Saving Measures Used While Shopping

- The most common measures used by shoppers for economizing include looking in the newspaper for grocery specials and using price-off coupons (Table 13).
- Most shoppers feel it is very or somewhat important to save time in the supermarket (Table 21). The most frequently used methods for saving time involve:
  - —Taking packaged meat available rather than asking for a different cut of meat.
  - —Looking only at items you know you need.
  - —Going to the supermarket at a particular time of day to avoid crowds.
  - —Buying larger quantities to avoid frequent shopping.
  - —Shopping at a particular supermarket because it has a better or faster checkout system (Table 22).

## Buying Habits and Shopping Behavior

- The average weekly grocery expense for households in 1988 is $71. Larger households tend to spend less per person, and smaller households tend to spend more (Tables 9, 10 and 11).
- Over half of the shopping public visit a single supermarket to do their weekly shopping. Slightly less than two shoppers in five go to two supermarkets in a week (Table 14).
- Six shoppers in ten make one or two trips to the supermarket each week, with the proportions about equally divided between one and two trips. Just over one shopper in five goes to the supermarket three times in a week (Table 17).

- Items for which shoppers tend to go to stores other than a supermarket include health and beauty aids, film, greeting cards, cosmetics, prescription drugs, household repair and houseware items, cosmetics, toys, and flowers and plants (Table 23).

## Attitudes Toward Nutrition and Food Safety

- Almost all shoppers are very or somewhat concerned about the nutritional content of the food they eat. Ninety-eight percent of all shoppers view nutrition, taste and product safety as very or somewhat important factors when selecting foods. A significantly larger proportion of shoppers rank "nutrition" as very important relative to "price" and "ease of preparation" (Tables 25 and 26).
- Nutrition-related issues that are of most concern to shoppers include fat content cholesterol levels, salt or sodium content, vitamin and mineral content, and sugar content (Table 27).
- About two-thirds of shoppers have changed how they prepare foods over the last three to five years. Changes tend to reflect nutritional concerns and most frequently involve less salt, less frying, less added fat, more broiling, and eating more vegetables and fresh foods (Table 29).

## New Products and Services for Supermarkets

- The new products that are most commonly available in supermarkets are food items designed especially for microwave cooking, unbranded or generic products, and delicatessen or carryout foods (Table 40). Of those shoppers whose supermarkets carry these items, about a fourth frequently use food products designed especially for microwave cooking and delicatessen or other carryout food items. Fewer than one shopper in five frequently buys unbranded or generic products (Table 41).
- The new products and services least common in supermarkets are ice cream shop (not packaged) ice cream, home shopping and delivery services, and fresh juice bars (Table 40). Of those whose supermarkets carry these items, one shopper in eight frequently buys ice cream shop ice cream and fewer than one in five frequently buys juice from a fresh juice bar. Only 3 percent frequently use home shopping and delivery services for groceries (Table 41).

# CHAPTER 1

## THE CONSUMER'S VIEW OF THE SUPERMARKET

### Consumer Expectations and Supermarket Performance

In 1988, for the second consecutive year, *Trends* examined closely the factors that are important to consumers when they select a supermarket (see Table 1). As in 1987, more than nine shoppers in ten rate the following factors as very or somewhat important in their selection of a supermarket:

- Quality produce, fruits and vegetables (98 percent).
- Good variety or wide selection (96 percent).
- Quality meat (94 percent).
- Good/low prices (94 percent).
- Courteous/friendly employees (93 percent).
- A convenient location (92 percent).
- Readable and accurate shelf tags (92 percent).

Consistent with last year's findings, other attributes viewed as somewhat or very important by at least two-thirds of all shoppers include:

- Fast checkout (88 percent).
- Items on sale or money-saving specials (86 percent).
- A convenient store layout (78 percent).
- Fresh food sections like a deli, bakery or fresh fish (76 percent).
- Express checkout (74 percent).
- Nutrition and health information available to shoppers (74 percent).
- National brands (73 percent).
- One-stop shopping (70 percent).

Notably, of the attributes used to characterize supermarkets, only "generic or unbranded products" rates as somewhat or very important by fewer than half of all shoppers (41 percent).

Between 1987 and 1988 importance ratings for most items remained stable. The only notable change occurred among the proportions of shoppers who view fresh food sections, such as a deli, bakery or fresh fish, as very or somewhat important. Last year 72 percent assigned these ratings, while in 1988 the proportion increased 4 percentage points.

When comparing shoppers by sex, men and women appear to place similar value on the same features when selecting a supermarket. Indeed, of the top seven items shown in Table 2, there are no major differences in the proportions of men and women who rate each item as very or somewhat important. Where there are differences, they exist mainly between men and *women not working outside the home.* A significantly higher proportion of women not working rate the following features as very or somewhat important:

- Items on sale or money-saving specials.
- A convenient store layout.
- Nutrition and health information available for shoppers.
- National brands.

Examining importance by population density, one finds several differences among shoppers in nonmetropolitan areas, those in metropolitan areas of under one million, and those in metropolitan areas of one million or more (see Table 3). Compared with those living in metropolitan areas of at least one million, significantly larger proportions of nonmetropolitan shoppers view courteous, friendly employees and items on sale or money-saving specials as very or somewhat important. A significantly smaller proportion view express checkout as very or somewhat important. A significantly larger proportion of shoppers in metropolitan areas of one million or more consider fresh food sections like a deli, bakery or fresh fish as very or somewhat important.

As in 1987, shoppers this year were presented with the same list of features to evaluate how they select a supermarket and asked to rate their principal supermarket on each feature (see Table 1).

Consistent with the 1987 findings, supermarkets are highly rated by the largest proportions of shoppers on:

- National brands (91 percent).
- A convenient location (88 percent).
- Good variety or wide selection (87 percent).
- Courteous, friendly employees (87 percent).
- Quality produce, fruits and vegetables (85 percent).
- Quality meat (85 percent).
- A convenient store layout (85 percent).

Of the remaining attributes, except for "nutrition and health information available for shoppers" and "generic

or unbranded products," more than two-thirds of all shoppers rate their supermarkets as excellent or good.

Over the past year ratings of supermarkets on particular items showed little change. A minimal increase occurred among the proportion of shoppers who rate their supermarkets as excellent or good on "one-stop shopping" (4 percentage point increase), and a minimal decrease occurred among shoppers who rate their supermarkets as excellent or good on "generic or unbranded products" (4 percentage point decrease).

Comparing importance ratings to performance ratings on each attribute, in several instances large positive or negative "gaps" appear. These suggest that supermarkets may be "under-performing" or "over-performing" relative to the importance consumers place on the attributes.

Notably, large negative gaps appear for:

- Nutrition and health information available for shoppers (24 point gap).
- Good/low prices (22 point gap).
- Readable and accurate shelf tags (22 point gap).
- Fast checkout (18 point gap).
- Quality produce, fruits and vegetables (13 point gap.)

The negative gaps shown for the above attributes indicate that opportunities exist for improving performance commensurate to expectations. Conversely, the large positive gaps for "national brands" and "generic or unbranded products" suggest that supermarkets may be overemphasizing these features relative to the importance that consumers place on them.

**Table 1**

## How Well Supermarkets Meet Consumer Expectations

Q: In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important or not at all important to you when you select a primary food store.

Q: Now I'm going to read the same list of factors and ask you to tell me how well the supermarket in which you usually shop does on each one. For each factor, please tell me whether your supermarket does an excellent, good, fair or poor job of having (READ EACH ITEM).

Base: The shopping public

| | | Very or Somewhat Important | | Excellent or Good Rating | | Rating-Importance Gap | |
|---|---|---|---|---|---|---|---|
| | | 1987 | **1988** | 1987 | **1988** | 1987 | **1988** |
| Quality produce, fruits and vegetables | % | 98 | **98** | 85 | **85** | -13 | **-13** |
| Good variety or wide selection | % | 96 | **96** | 88 | **87** | - 8 | **- 9** |
| Quality meat | % | 96 | **94** | 82 | **85** | -14 | **- 9** |
| Good/low prices | % | 93 | **94** | 73 | **72** | -20 | **-22** |
| Courteous, friendly employees | % | 93 | **93** | 87 | **87** | - 6 | **- 6** |
| A convenient location | % | 92 | **92** | 87 | **88** | - 5 | **- 4** |
| Readable and accurate shelf tags | % | 90 | **92** | 73 | **70** | -17 | **-22** |
| Fast checkout | % | 89 | **88** | 70 | **70** | -19 | **-18** |
| Items on sale, or money-saving specials | % | 85 | **86** | 78 | **79** | - 7 | **- 7** |
| A convenient store layout | % | 79 | **78** | 83 | **85** | + 4 | **+ 7** |
| Fresh food sections like a deli, bakery or fresh fish** | % | 72 | **76** | 75 | **77** | + 3 | **+ 1** |
| Express checkout | % | 71 | **74** | 72 | **74** | + 1 | **0** |
| Nutrition and health information available for shoppers | % | 75 | **74** | 50 | **50** | -25 | **-24** |
| National brands | % | 72 | **73** | 89 | **91** | +17 | **+18** |
| One-stop shopping | % | 70 | **70** | 68 | **72** | - 2 | **+ 2** |
| Generic or unbranded products | % | 41 | **41** | 61 | **57** | +20 | **+16** |

**In 1987, shoppers were asked to rate "specialty sections like a deli, bakery or fresh fish."

**Table 2** **Importance of Supermarket Features, by Sex**

Q: In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important or not at all important to you when you select a primary food store.

Base: The shopping public

| | | Jan. 1988 Total | Men | Women | |
|---|---|---|---|---|---|
| | | | | Working | Nonworking |
| Base | | **1019** | 402 | 345 | 269 |
| *Very or Somewhat Important* | | | | | |
| Quality produce, fruits and vegetables | % | **98** | 99 | 98 | 99 |
| Good variety or wide selection | % | **96** | 95 | 97 | 98 |
| Quality meat | % | **94** | 94 | 94 | 95 |
| Good/low prices | % | **94** | 91 | 95 | 94 |
| Courteous, friendly employees | % | **93** | 90 | 93 | 93 |
| A convenient location | % | **92** | 90 | 92 | 91 |
| Readable and accurate shelf tags | % | **92** | 88 | 93 | 92 |
| Fast checkout | % | **88** | 91 | 88 | 87 |
| Items on sale, or money-saving specials | % | **86** | 79 | 85 | 91 |
| A convenient store layout | % | **78** | 73 | 77 | 83 |
| Fresh food sections like a deli, bakery or fresh fish** | % | **76** | 77 | 73 | 78 |
| Nutrition and health information available for shoppers | % | **74** | 68 | 74 | 77 |
| Express checkout | % | **74** | 77 | 72 | 73 |
| National brands | % | **73** | 69 | 73 | 77 |
| One-stop shopping | % | **70** | 68 | 72 | 67 |
| Generic or unbranded products | % | **41** | 38 | 40 | 43 |

**In 1987, shoppers were asked to rate "specialty sections like a deli, bakery or fresh fish."

**Table 3** **Importance of Supermarket Features, by Population Density**

Q: In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important or not at all important to you when you select a primary food store.

Base: The shopping public

| | | Jan. 1988 Total | Non-Metro | Metro | |
|---|---|---|---|---|---|
| | | | | Under 1 Million | 1 Million or Over |
| Base | | **1019** | 276 | 350 | 393 |
| *Very or Somewhat Important* | | | | | |
| Quality produce, fruits and vegetables | % | **98** | 98 | 98 | 98 |
| Good variety or wide selection | % | **96** | 97 | 97 | 96 |
| Quality meat | % | **94** | 95 | 94 | 95 |
| Good/low prices | % | **94** | 96 | 93 | 93 |
| Courteous, friendly employees | % | **93** | 95 | 93 | 90 |
| A convenient location | % | **92** | 91 | 90 | 93 |
| Readable and accurate shelf tags | % | **92** | 92 | 91 | 92 |
| Fast checkout | % | **88** | 87 | 88 | 89 |
| Items on sale, or money-saving specials | % | **86** | 90 | 86 | 82 |
| A convenient store layout | % | **78** | 78 | 77 | 79 |
| Fresh food sections like a deli, bakery or fresh fish** | % | **76** | 68 | 75 | 83 |
| Nutrition and health information available for shoppers | % | **74** | 75 | 76 | 72 |
| Express checkout | % | **74** | 70 | 72 | 78 |
| National brands | % | **73** | 75 | 70 | 76 |
| One-stop shopping | % | **70** | 71 | 68 | 70 |
| Generic or unbranded products | % | **41** | 41 | 39 | 42 |

**In 1987, shoppers were asked to rate "specialty sections like a deli, bakery or fresh fish."

## Overall Satisfaction with Supermarkets

As an overall measure of supermarket performance, shoppers were asked to rate their principal supermarket on a scale of one to ten, where "one" indicates they feel their supermarket is doing a poor job and "ten" indicates they feel it is doing an excellent job. Consistent with the high performance ratings on individual attributes, most shoppers are pleased with their principal supermarket, rating it 7.9 on average. When compared to 1987, ratings remained relatively constant across supermarket categories (see Table 4). The only significant change occurred among 25- to 39-year-old shoppers, 28 percent of whom rated their supermarket "nine" or "ten" in 1988, as opposed to 21 percent in 1987.

Comparing shoppers who rate their principal supermarket "nine" or "ten," several population groups stand out as more or less satisfied with their supermarket's overall performance. Notable differences emerge among the following categories:

*Sex and Work Status:* Compared with men and working women, larger proportions of women not working outside the home give their supermarket high ratings.

*Household Size:* Relative to shoppers in one- and four-person households, fewer of those in households of five or more rate their supermarket "nine" or "ten."

*Age:* Shoppers 65 years old and older tend to be more satisfied with their supermarket's overall performance than younger shoppers, with more than half (51 percent) of the former group rating their supermarket "nine" or "ten."

*Income:* Smaller proportions of shoppers earning over $15,000 give their supermarket high ratings, compared with those earning between $7,501 and $15,000. Other apparent differences between income groups are not statistically significant.

This year *Trends* investigated the factors that determine shoppers' levels of satisfaction with their supermarkets. From the analysis, the most important factor in determining a shopper's satisfaction is service, including:

- Level of service overall.
- Improvements in service over time.
- A fast checkout system.
- One-stop shopping.
- Information made available to shoppers on best buys.

The analysis indicates that by focusing on both these general and specific service demands, supermarkets can enhance the overall levels of customer satisfaction.

## Table 4 Consumers Evaluate Their Principal Supermarket

Q: All things considered, how satisfied are you with the job the supermarket in which you usually shop is doing with respect to meeting your grocery shopping needs? Please use a scale of one to ten, where "one" means it is doing a poor job, and "ten" means it is doing an excellent job. Use any number from one to ten.

Base: The shopping public

| | Average Rating (1 to 10 Scale) | | Percentage Rating Supermarket 9 or 10 | |
|---|---|---|---|---|
| | 1987 | **1988** | 1987 % | **1988** % |
| Total | 7.8 | **7.9** | 31 | **32** |
| *Sex* | | | | |
| Men | 7.6 | **7.7** | 24 | **29** |
| Women | 7.9 | **7.9** | 32 | **32** |
| Working | 7.7 | **7.7** | 26 | **26** |
| Nonworking | 8.1 | **8.2** | 38 | **41** |
| *Type of Household* | | | | |
| With Children | 7.7 | **7.8** | 26 | **29** |
| No Children | 8.0 | **8.0** | 35 | **34** |
| *Size of Household* | | | | |
| 1 | 8.1 | **8.1** | 40 | **40** |
| 2 | 7.9 | **7.9** | 33 | **30** |
| 3 | 7.8 | **7.9** | 26 | **30** |
| 4 | 7.7 | **8.0** | 30 | **36** |
| 5 or more | 7.9 | **7.5** | 26 | **23** |
| *Age* | | | | |
| 18-24 | 7.3 | **7.9** | 16 | **23** |
| 25-39 | 7.6 | **7.8** | 21 | **28** |
| 40-49 | 7.9 | **7.6** | 34 | **27** |
| 50-64 | 8.2 | **8.1** | 40 | **36** |
| 65 and older | 8.3 | **8.3** | 52 | **51** |
| *Income* | | | | |
| $7,500 or less | 8.1 | **8.0** | 44 | **37** |
| $7,501-$15,000 | 7.9 | **8.0** | 32 | **40** |
| $15,001-$25,000 | 7.9 | **7.8** | 33 | **28** |
| $25,001 or more | 7.8 | **7.9** | 26 | **30** |

## Potential Improvements to Supermarkets

As in 1987, in 1988 *Trends* closed the evaluation of supermarket performance by asking shoppers to rate the appeal of several suggested improvements to supermarkets (see Table 5). Shoppers were asked to use a scale of one to ten, where "one" indicates that the suggestion is not at all appealing, and "ten" indicates that it is very appealing. Suggestions receiving the highest average ratings include:

- Special indicators on product displays to indicate "best buys" (7.7).
- Store maps to indicate where items are located (7.2).
- Clerks who put bags in your car (6.9).
- An in-store bank (5.6).

For the suggestions above, between 27 percent and 40 percent of all shoppers gave ratings of "nine" or "ten." Fewer than one shopper in five assigned these ratings to any of the remaining suggestions.

For two of the suggested improvements, substantial differences are found between the proportions of men and women giving ratings of "nine" or "ten." Compared with women, fewer men give high ratings to "clerks who put bags in your car" and "special indicators on product displays to indicate 'best buys' " (see Table 6).

Across age groups, larger proportions of 18- to 24-year-old shoppers appear to be more receptive to several suggested improvements than older shoppers (see Table 7). Compared with shoppers age 25 to 39, a significantly larger proportion of 18- to 24-year-olds rate an in-store restaurant "nine" or "ten." Relative to all other age groups, larger proportions of 18- to 24-year-old shoppers give high ratings to an in-store bank and a service through which you can order groceries from home using a personal computer. Similarly, a larger proportion of shoppers in metropolitan areas of at least one million rate the suggested grocery ordering service "nine" or "ten" than those in metropolitan areas of under one million (see Table 8). Relative to nonmetropolitan shoppers, a significantly smaller proportion of those in metropolitan areas of over one million give high ratings to the suggestion to have clerks who put bags in your car.

**Table 5** **Appeal of Suggested Improvements to Supermarkets**

Q: Thinking of improvements to supermarkets, there are a number of things that supermarkets do or might do to enhance your shopping experience. I'm going to read a series of ideas. For each one, please tell me how appealing it would be to you, using a 10-point scale, where "one" is not at all appealing and "ten" is very appealing to you. Please use any number from one to ten.

Base: The shopping public

| | Average Rating (1 to 10 Scale) | | Percentage Rating Supermarket 9 or 10 | |
|---|---|---|---|---|
| | 1987 | **1988** | 1987 % | **1988 %** |
| Special indicators on product displays to indicate "best buys" | 7.5 | **7.7** | 37 | **40** |
| Store maps to indicate where items are located | x | **7.2** | x | **40** |
| Clerks who put bags in your car | 7.0 | **6.9** | 43 | **40** |
| An in-store bank | x | **5.6** | x | **27** |
| Video displays that provide information about health, nutrition, cooking tips and the like | 4.6 | **4.9** | 11 | **12** |
| A service through which you can order groceries from home using a personal computer | 4.4 | **4.2** | 17 | **17** |
| In-store music | 4.3 | **4.2** | 10 | **9** |
| An in-store restaurant | 3.8 | **4.0** | 10 | **11** |

x = Not asked.

## Table 6 Appeal of Suggested Improvements to Supermarkets, by Sex

Q: Thinking of improvements to supermarkets, there are a number of things that supermarkets do or might do to enhance your shopping experience. I'm going to read a series of ideas. For each one, please tell me how appealing it would be to you, using a 10-point scale, where "one" is not at all appealing and "ten" is very appealing to you. Please use any number from one to ten.

Base: The shopping public

| | | Jan. 1988 Total | | Women | |
|---|---|---|---|---|---|
| | | | Men | Working | Nonworking |
| Base | | **1019** | 402 | 345 | 269 |
| *Rating Suggestion "nine" or "ten"* | | | | | |
| Clerks who put bags in your car | % | **40** | 23 | 42 | 47 |
| Special indicators on product displays to indicate "best buys" | % | **40** | 27 | 42 | 43 |
| Store maps to indicate where items are located | % | **40** | 36 | 40 | 42 |
| An in-store bank | % | **27** | 23 | 27 | 28 |
| A service through which you can order groceries from home using a personal computer | % | **17** | 13 | 18 | 17 |
| Video displays that provide information about health, nutrition, cooking tips and the like | % | **12** | 10 | 11 | 14 |
| An in-store restaurant | % | **11** | 8 | 10 | 14 |
| In-store music | % | **9** | 7 | 10 | 8 |

## Table 7 Appeal of Suggested Improvements to Supermarkets, by Age

Q: Thinking of improvements to supermarkets, there are a number of things that supermarkets do or might do to enhance your shopping experience. I'm going to read a series of ideas. For each one, please tell me how appealing it would be to you, using a 10-point scale, where "one" is not at all appealing and "ten" is very appealing to you. Please use any number from one to ten.

Base: The shopping public

| | | Jan. 1988 Total | Age | | | | |
|---|---|---|---|---|---|---|---|
| | | | 18-24 | 25-39 | 40-49 | 50-64 | 65+ |
| Base | | **1019** | 82 | 407 | 162 | 214 | 128 |
| *Rating Suggestion "nine" or "ten"* | | | | | | | |
| Clerks who put bags in your car | % | **40** | 45 | 37 | 45 | 39 | 42 |
| Special indicators on product displays to indicate "best buys" | % | **40** | 44 | 44 | 38 | 37 | 31 |
| Store maps to indicate where items are located | % | **40** | 45 | 35 | 41 | 43 | 45 |
| An in-store bank | % | **27** | 42 | 27 | 25 | 25 | 21 |
| A service through which you can order groceries from home using a personal computer | % | **17** | 34 | 19 | 19 | 10 | 5 |
| Video displays that provide information about health, nutrition, cooking tips and the like | % | **12** | 14 | 11 | 12 | 13 | 10 |
| An in-store restaurant | % | **11** | 20 | 8 | 11 | 12 | 13 |
| In-store music | % | **9** | 8 | 7 | 9 | 12 | 9 |

## Table 8 Appeal of Suggested Improvements to Supermarkets, by Population Density

Q: Thinking of improvements to supermarkets, there are a number of things that supermarkets do or might do to enhance your shopping experience. I'm going to read a series of ideas. For each one, please tell me how appealing it would be to you, using a 10-point scale, where "one" is not at all appealing and "ten" is very appealing to you. Please use any number from one to ten.

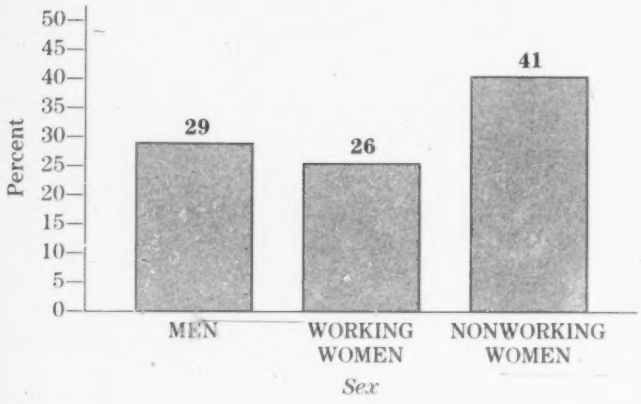
Base: The shopping public

| | | Jan. 1988 Total | Non-Metro | Metro: Under 1 Million | Metro: 1 Million or Over |
|---|---|---|---|---|---|
| Base | | **1019** | 276 | 350 | 393 |
| *Rating Suggestion "nine" or "ten"* | | | | | |
| Clerks who put bags in your car | % | **40** | 48 | 40 | 33 |
| Special indicators on product displays to indicate "best buys" | % | **40** | 39 | 41 | 39 |
| Store maps to indicate where items are located | % | **40** | 39 | 41 | 39 |
| An in-store bank | % | **27** | 25 | 27 | 28 |
| A service through which you can order groceries from home using a personal computer | % | **17** | 15 | 13 | 21 |
| Video displays that provide information about health, nutrition, cooking tips and the like | % | **12** | 9 | 10 | 16 |
| An in-store restaurant | % | **11** | 12 | 11 | 10 |
| In-store music | % | **9** | 9 | 10 | 8 |

## Consumers' Evaluations of Their Principal Supermarket

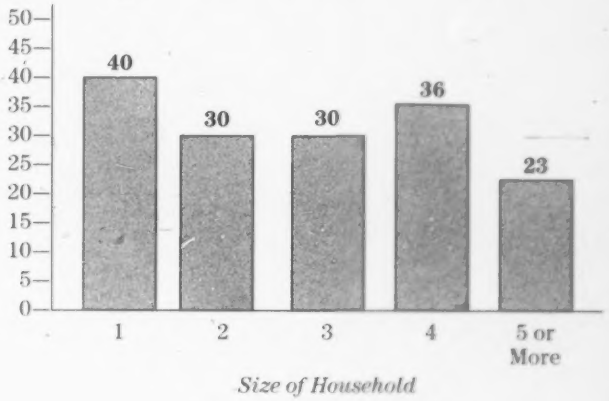
### Consumers' Evaluations of Their Principal Supermarket by Sex 1988

Percentage Rating Supermarket 9 or 10



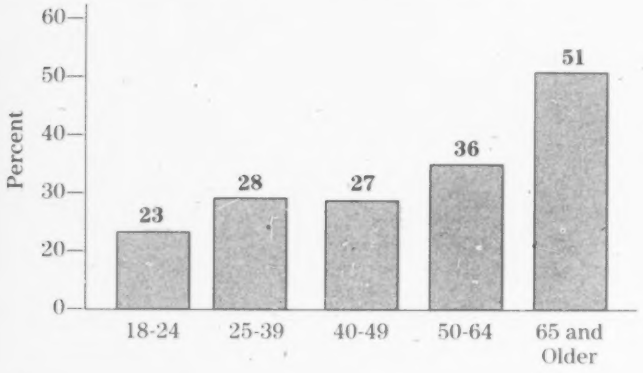

### Consumers' Evaluations of Their Principal Supermarket by Household Size 1988

Percentage Rating Supermarket 9 or 10



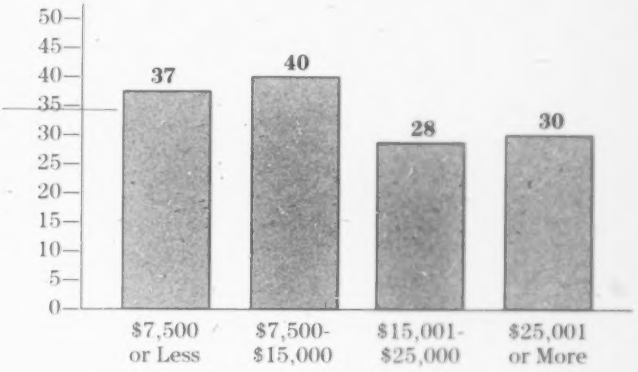

### Consumers' Evaluations of Their Principal Supermarket by Age 1988

Percentage Rating Supermarket 9 or 10




### Consumers' Evaluations of Their Principal Supermarket by Income 1988

Percentage Rating Supermarket 9 or 10



# CHAPTER 2

## SPENDING AND SAVING MONEY

### The Weekly Grocery Bill

From January 1987 to January 1988, average weekly grocery expenses remained virtually unchanged (see Table 9). In two of the spending categories, $41 to $60 and $101 or more, proportions declined minimally, while in the remaining two categories, under $40 and $61 to $100, proportions increased minimally.

Examining the changes in weekly spending by household size, a slight decline occurred for three-person households, and a somewhat larger decline occurred among households of five or more (see Table 10). In one- and two-person households, average weekly grocery expenses increased to close to their January 1986 levels, while that for four-person households reached a new high of $88.

In per-person weekly grocery expenses (see Table 11), minimal change occurred across the total shopper population and across individual categories of shoppers. Within categories of shoppers, larger households tend to spend less per person, compared with smaller households. Similarly, those with children tend to spend less per person than those without.

**Table 9** **Weekly Family Grocery Expenses: 1981-1988**

Base: The shopping public

Q: About how much do you spend each week on groceries for your family?

| | Total | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Jan. 1981 | Jan. 1982 | Jan. 1983 | Jan. 1984 | Jan. 1985 | Jan. 1986 | Jan. 1987 | **Jan. 1988** |
| | % | % | % | % | % | % | % | **%** |
| $0-$40 | 29 | 30 | 28 | 23 | 23 | 19 | 21 | **23** |
| $41-$60 | 29 | 25 | 29 | 29 | 27 | 28 | 26 | **25** |
| $61-$100 | 31 | 30 | 33 | 34 | 34 | 38 | 37 | **38** |
| $101 and over | 6 | 8 | 9 | 9 | 12 | 13 | 12 | **11** |
| Not sure/no answer/refused | * | 7 | 1 | 4 | 4 | 3 | 3 | **3** |
| Average weekly grocery expenses | $55 | $58 | $62 | $64 | $68 | $74 | $72 | **$71** |

*Not available in 1981.
May not add up to 100 percent due to rounding.

## Table 10 Weekly Family Grocery Expenses for Different Size Families: 1982-1988

Base: The shopping public

Q: About how much do you spend each week on groceries for your family?

| | Total | | | | | | |
|---|---|---|---|---|---|---|---|
| | Jan. 1982 | Jan. 1983 | Jan. 1984 | Jan. 1985 | Jan. 1986 | Jan. 1987 | **Jan. 1988** |
| | $ | $ | $ | $ | $ | $ | **$** |
| *Size of Household* | | | | | | | |
| 1 | 33 | 36 | 40 | 40 | 41 | 33 | **38** |
| 2 | 51 | 54 | 59 | 58 | 62 | 58 | **61** |
| 3 | 70* | 72* | 71 | 76 | 76 | 77 | **74** |
| 4 | 70* | 72* | 80 | 85 | 84 | 85 | **88** |
| 5 or more | 90 | 85 | 82 | 92 | 103 | 104 | **98** |

*Expenses for 1982 and 1983 are combined for three- and four-person households.

## Table 11 Average Per-Person Weekly Grocery Expenses: 1982-1988

Base: The shopping public

| | Total | | | | | | |
|---|---|---|---|---|---|---|---|
| | Jan. 1982 | Jan. 1983 | Jan. 1984 | Jan. 1985 | Jan. 1986 | Jan. 1987 | **Jan. 1988**** |
| | $ | $ | $ | $ | $ | $ | **$** |
| Total | 21 | 22 | 23 | 24 | 27 | 24 | **26** |
| *Married* | | | | | | | |
| One spouse at home | 20 | 20 | 22 | 23 | 25 | 23 | **24** |
| Two wage-earners | 22 | 22 | 23 | 23 | 26 | 25 | **25** |
| *Size of Household* | | | | | | | |
| 1 | 33 | 36 | 40 | 40 | 41 | 33 | **38** |
| 2 | 26 | 27 | 29 | 29 | 31 | 27 | **29** |
| 3-4 | 20 | 21 | 22 | 23 | 23 | 23 | **23** |
| 5 and over | 17 | 16 | 15 | 17 | 19 | 17 | **17** |
| *Type of Household* | | | | | | | |
| With children | 19 | 19 | 19 | 21 | 21 | 21 | **22** |
| No children | 25 | 28 | 28 | 29 | 32 | 28 | **31** |
| *Region* | | | | | | | |
| East | 23 | 22 | 23 | 25 | 28 | 25 | **26** |
| Midwest | 20 | 20 | 22 | 21 | 25 | 22 | **25** |
| South | 20 | 24 | 23 | 24 | 26 | 25 | **26** |
| West | 23 | 24 | 24 | 26 | 27 | 24 | **29** |

**Calculated from average weekly grocery expenses and household size. Where data was missing, responses were omitted from the calculation.

## Saving Money

In 1988, shoppers reversed the trend toward less frequent use of economizing measures. The greatest increase occurred among those who "look in the newspaper for grocery specials" pretty much every time they shop (see Table 12). In January 1988, 42 percent practiced this measure pretty much every time, compared with 29 percent in January 1987. Smaller increases occurred among those who "use price-off coupons" and "compare prices at different supermarkets" pretty much every time they shop. The proportion who "go to supermarkets other than their principal one for advertised specials" remained unchanged at 12 percent.

Except for "going to supermarkets other than their principal one for advertised specials," women not working outside the home are more likely to practice every economizing measure pretty much every time they shop than are working women or men (see Table 13). Over half (52 percent) of women not working "look in the newspaper for grocery specials" pretty much every time they shop, versus two-fifths (39 percent) of working women, and under a third (31 percent) of men. Similarly, almost half (48 percent) of women not working outside the home "use price-off coupons" pretty much every time they shop, compared with about four working women in ten (39 percent), and fewer than three men in ten (28 percent). Finally, about a third (32 percent) of women not working outside the home "compare prices at different supermarkets" pretty much every time they shop, as opposed to less than a fourth of working women and men (23 and 22 percent, respectively).

Lower proportions of shoppers age 18 to 39 "look in the newspaper for grocery specials" pretty much every time they shop, compared with those who are 50 or older. Whereas about a third of 18- to 39-year olds "look for specials in the newspaper" pretty much every time they shop, about half of those 50 or older practice this measure pretty much every time they shop.

Differences in economizing measures also appear by the population of the place in which shoppers live, and by region. Compared with metropolitan shoppers, larger proportions of nonmetropolitan shoppers "look in newspapers for grocery specials" pretty much every time they shop. Larger proportions of nonmetropolitan shoppers also "compare prices at different supermarkets" pretty much every time they shop, relative to metropolitan shoppers in areas of one million or more. Smaller proportions of nonmetropolitan shoppers, however, "use price-off coupons" pretty much every time they shop, compared with those in metropolitan areas of under one million. Regionally, Easterners are more likely to "look in the newspaper for grocery specials" pretty much every time they shop compared with Westerners. Easterners are also more likely to "use price-off coupons" than are Southerners and Westerners. Finally, compared with Westerners, those in the Midwest and South are more likely to "compare prices at different supermarkets."

Among economizing measures across different income groups, the only significant difference in 1988 occurs in those who "look in the newspaper for grocery specials" pretty much every time they shop. Shoppers with household incomes of $7,500 or less are most likely to take this measure pretty much every time they shop (62 percent), while those with incomes of $15,001 or more are less likely. Shoppers whose household incomes are more than $25,000 are the least likely to "look in the newspaper for grocery specials" pretty much every time they shop.

## Table 12 How Often Shoppers Use Supermarket Specials, Coupons and Price Comparisons: 1982-1988

Base: The shopping public

Q: How often do you (READ EACH ITEM) — pretty much every time you shop, fairly often, only occasionally or never?

| | | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Pretty Much Every Time | Pretty Much Every Time | Pretty Much Every Time | Pretty Much Every Time | Pretty Much Every Time | Pretty Much Every Time | Pretty Much Every Time | Fairly Often | Only Occa-sion-ally | Never | Not Sure |
| Look in the newspaper for grocery specials | % | 50 | 52 | 49 | 41 | 40 | ** | 42 | 22 | 24 | 12 | * |
| Use price-off coupons | % | 39 | 38 | 39 | 30 | 39 | 37 | 40 | 21 | 27 | 12 | * |
| Compare prices at different supermarkets | % | 32 | 30 | 29 | 27 | 25 | 23 | 26 | 21 | 32 | 20 | * |
| Go to supermarkets other than your principal one for advertised specials | % | 16 | 13 | 12 | 10 | 9 | 12 | 12 | 16 | 47 | 24 | 1 |

*Less than 0.5 percent.
**Not reported due to data anomaly.

**Table 13**

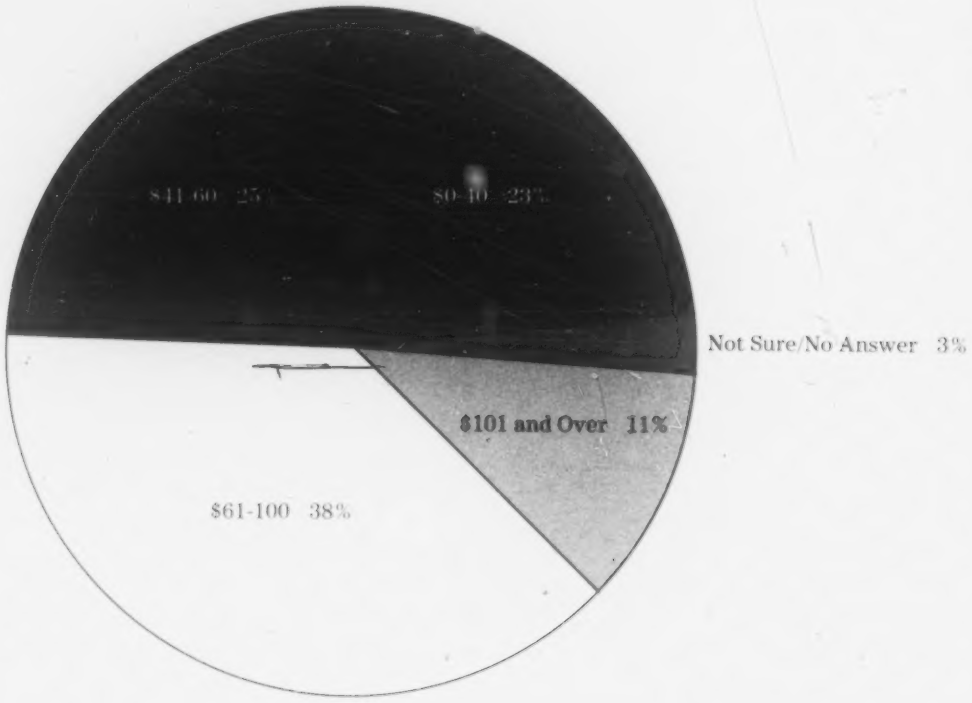
## How Shopper Subgroups Vary in Their Use of Supermarket Specials, Coupons and Price Comparisons

Base: The shopping public

Q: How often do you (READ EACH ITEM) — pretty much every time you shop, fairly often, only occasionally or never?

| | Jan. 1988 Base | | Look in the Newspaper for Grocery Specials | Use Price-off Coupons | Compare Prices at Different Supermarkets | Go to Supermarkets Other Than Your Principal One for Advertised Specials |
|---|---|---|---|---|---|---|
| *Pretty Much Every Time* | | | | | | |
| Total | **1019** | % | 42 | 40 | 26 | 12 |
| *Sex* | | | | | | |
| Men | **402** | % | 31 | 28 | 22 | 10 |
| Women | **617** | % | 45 | 43 | 27 | 12 |
| Working | **345** | % | 39 | 39 | 23 | 10 |
| Nonworking | **269** | % | 52 | 48 | 32 | 15 |
| *Age* | | | | | | |
| 18-24 | **82** | % | 30 | 33 | 26 | 14 |
| 25-39 | **407** | % | 36 | 43 | 24 | 10 |
| 40-49 | **162** | % | 45 | 37 | 22 | 11 |
| 50-64 | **214** | % | 50 | 40 | 33 | 16 |
| 65 and over | **128** | % | 52 | 40 | 28 | 11 |
| *Population Density* | | | | | | |
| Non-metropolitan | **276** | % | 51 | 35 | 32 | 14 |
| Metropolitan | | | | | | |
| Under 1 million | **350** | % | 42 | 45 | 27 | 12 |
| 1 million or over | **393** | % | 36 | 39 | 21 | 10 |
| *Region* | | | | | | |
| East | **260** | % | 48 | 49 | 26 | 11 |
| Midwest | **277** | % | 41 | 41 | 28 | 12 |
| South | **310** | % | 42 | 38 | 29 | 14 |
| West | **172** | % | 36 | 28 | 18 | 8 |
| *Income* | | | | | | |
| $7,500 or less | **55** | % | 62 | 34 | 34 | 12 |
| $7,501 to $15,000 | **137** | % | 49 | 44 | 36 | 19 |
| $15,001 to $25,000 | **221** | % | 45 | 41 | 24 | 14 |
| $25,001 or more | **529** | % | 36 | 39 | 24 | 10 |

**Weekly Family Grocery Expenses**
**1983-1988**



# CHAPTER 3

## SHOPPING PATTERNS

Between 1987 and 1988, there was no change in the average number of supermarkets that shoppers visit each week, nor was there any change in the proportions of shoppers who visit one, two, three or four or more supermarkets each week (see Table 14). More than half (53 percent) of all shoppers go to only one supermarket each week, while somewhat less than two-fifths (37 percent) go to two. One shopper in ten (10 percent) visits three or more supermarkets each week.

Significant differences are evident between men and women shoppers. Approximately equal proportions of men visit one and two supermarkets each week (46 and 43 percent, respectively) (see Table 15). This behavior is significantly different from that of women, over half of whom visit a single supermarket in a week (54 percent) and more than a third of whom go to two supermarkets (36 percent). The proportions of men and women who visit three or more supermarkets in a week are not significantly different from one another.

As in earlier years, shoppers who go to only one supermarket each week were asked if this is the same supermarket or a different one from week to week. In 1988, nine in ten claimed to visit the same supermarket every week (90 percent), indicating these shoppers' strong loyalties to a principal supermarket (see Table 16). This proportion has remained virtually unchanged since 1986.

The average number of visits that shoppers make to a supermarket each week — whether to the shopper's principal supermarket or to a different one — held close to steady over the past year at 2.3 (see Table 17). Excluding 1986, these figures indicate that whatever else may have changed at the supermarket, the frequency of shopping has remained almost the same for the past seven years. Similarly, the proportions of shoppers who fall into the seven frequency groupings have fluctuated only slightly since 1981.

Across age categories, slight differences exist in the number of visits made each week to a supermarket (see Table 18). Compared with older shoppers, individuals under 25 are more likely to make only one or two visits each week to the supermarket and less likely to make three or more. Among 18- to 24-year-olds, almost three-fourths (72 percent) visit only once or twice each week. In the remaining age groups the proportions making only one or two visits range from somewhat over half (54 percent) for those 65 and older to about three-fifths (62 percent) for those 25 to 39. By age, a significantly larger proportion of 18- to 24-year-olds visit a single supermarket for their shopping, relative to all other age groups. A significantly smaller proportion of young shoppers visit two supermarkets each week. By household size, a significantly larger proportion of single-person households are likely to make only one visit to the supermarket in a single week compared with households of two or more (see Table 19).

As shown in Table 20, there are no significant differences between men and women nor between working women and women not working outside the home in the number of supermarkets trips made each week.

## Table 14 Number of Different Supermarkets Shoppers Use: 1981-1988

Base: The shopping public

Q: About how many different supermarkets do you usually visit in a week to do your weekly shopping?

| | Total | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Jan. 1981 | Jan. 1982 | Jan. 1983 | Jan. 1984 | Jan. 1985 | Jan. 1986 | Jan. 1987 | **Jan. 1988** |
| | % | % | % | % | % | % | % | **%** |
| 1 | 46 | 56 | 50 | 51 | 56 | 57 | 53 | **53** |
| 2 | 39 | 34 | 37 | 37 | 35 | 36 | 37 | **37** |
| 3 | 11 | 8 | 11 | 9 | 7 | 5 | 8 | **8** |
| 4 or more | 5 | 1 | 2 | 1 | 2 | 2 | 2 | **2** |
| Average number of different supermarkets visited per week | 1.8 | 1.5 | 1.6 | 1.6 | 1.5 | 1.5 | 1.6 | **1.6** |

May not add up to 100 percent due to rounding.

## Table 15 Number of Different Supermarkets Shoppers Use, by Sex and Age

Base: The shopping public

Q: About how many different supermarkets do you usually visit in a week to do your weekly shopping?

| | **Jan. 1988** | Sex | | Age | | | | |
|---|---|---|---|---|---|---|---|---|
| | **Total** | Men | Women | 18-24 | 25-39 | 40-49 | 50-64 | 65+ |
| Base | **1019** | 402 | 617 | 82 | 407 | 162 | 214 | 128 |
| | % | % | % | % | % | % | % | % |
| *Number of Supermarkets* | | | | | | | | |
| 1 | **53** | 46 | 54 | 71 | 53 | 51 | 50 | 48 |
| 2 | **37** | 43 | 36 | 23 | 39 | 39 | 37 | 38 |
| 3 | **8** | 8 | 7 | 4 | 7 | 7 | 11 | 9 |
| 4 or more | **2** | 3 | 1 | 2 | 2 | 1 | 1 | 1 |
| Average number of different supermarkets visited per week | **1.6** | 1.7 | 1.6 | 1.4 | 1.6 | 1.6 | 1.6 | 1.7 |

May not add up to 100 percent due to rounding.

## Table 16 Store Loyalty

Base: Shoppers who visit only one supermarket in a week

Q: Is this the same supermarket each week, or do you visit different ones from week to week?

| | | Jan. 1986 | Jan. 1987 | **Jan. 1988** | | |
|---|---|---|---|---|---|---|
| | | Same Each Week | Same Each Week | Same Each Week | Different | Not Sure |
| Total | % | 90 | 89 | 90 | 9 | 1 |
| Men | % | 89 | 90 | 88 | 11 | 1 |
| Women | % | 90 | 89 | 90 | 9 | 1 |
| Working | % | 92 | 87 | 89 | 9 | 1 |
| Nonworking | % | 87 | 91 | 91 | 8 | 0 |

May not add up to 100 percent due to rounding.

## Table 17 How Often Shoppers Go to the Supermarket in an Average Week: 1981-1988

Base: The shopping public

Q: About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different supermarkets.

| | Total | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Jan. 1981 | Jan. 1982 | Jan. 1983 | Jan. 1984 | Jan. 1985 | Jan. 1986 | Jan. 1987 | **Jan. 1988** |
| | % | % | % | % | % | % | % | **%** |
| *Number of Visits* | | | | | | | | |
| 1 | 26 | 31 | 31 | 31 | 29 | 31 | 29 | **28** |
| 2 | 33 | 32 | 34 | 31 | 32 | 34 | 32 | **32** |
| 3 | 21 | 20 | 20 | 20 | 20 | 20 | 21 | **22** |
| 4 | 8 | 7 | 8 | 8 | 9 | 6 | 8 | **9** |
| 5 | 4 | 3 | 3 | 4 | 4 | 4 | 3 | **4** |
| 6 or more | 6 | 3 | 3 | 3 | 4 | 2 | 4 | **3** |
| Every 2 weeks | 1 | 1 | * | 2 | 2 | 1 | 1 | **2** |
| Average number of supermarket visits per week | 2.6 | 2.3 | 2.3 | 2.3 | 2.3 | 2.0 | 2.4 | **2.3** |

*Less than 0.5 percent.
"Other" and "not sure" omitted in 1988.

## Table 18 How Often Shoppers Go to the Supermarket in an Average Week, by Age

Base: The shopping public

Q: About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different supermarkets.

| | Jan. 1988 Total | Age | | | | |
|---|---|---|---|---|---|---|
| | | 18-24 Years | 25-39 Years | 40-49 Years | 50-64 Years | 65 and Over |
| Base | **1019** | 82 | 407 | 162 | 214 | 128 |
| | % | % | % | % | % | % |
| *Number of Visits* | | | | | | |
| 1 | **28** | 32 | 28 | 22 | 28 | 27 |
| 2 | **32** | 40 | 34 | 34 | 28 | 27 |
| 3 | **22** | 17 | 21 | 19 | 25 | 27 |
| 4 | **9** | 2 | 9 | 11 | 9 | 9 |
| 5 | **4** | 5 | 4 | 5 | 6 | 3 |
| 6 or more | **3** | 1 | 3 | 3 | 2 | 4 |
| Every 2 weeks | **2** | 3 | 1 | 4 | 0 | 2 |
| Average number of supermarket visits per week | **2.3** | 2.0 | 2.3 | 2.4 | 2.4 | 2.4 |

"Other" and "not sure" omitted in 1988.

## Table 19 How Often Shoppers Go to the Supermarket in an Average Week, by Different Size Families

Base: The shopping public

Q: About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different supermarkets.

| | Jan. 1988 Total | Size of Household | | | | |
|---|---|---|---|---|---|---|
| | | One | Two | Three | Four | Five or More |
| Base | **1019** | 158 | 360 | 181 | 194 | 122 |
| | % | % | % | % | % | % |
| *Number of Visits* | | | | | | |
| 1 | **28** | 43 | 27 | 24 | 23 | 25 |
| 2 | **32** | 28 | 31 | 36 | 32 | 34 |
| 3 | **22** | 17 | 23 | 20 | 23 | 25 |
| 4 | **9** | 1 | 9 | 10 | 11 | 9 |
| 5 | **4** | 3 | 4 | 5 | 5 | 4 |
| 6 or more | **3** | 4 | 2 | 2 | 5 | 2 |
| Every 2 weeks | **2** | 2 | 2 | 2 | 1 | * |
| Average number of supermarket visits per week | **2.3** | 2.0 | 2.3 | 2.3 | 2.6 | 2.4 |

*Less than 0.5 percent.
"Other" and "not sure" omitted in 1988.

## Table 20 How Often Shoppers Go to the Supermarket in an Average Week, by Sex

Base: The shopping public

Q: About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different supermarkets.

| | Jan. 1988 | | | |
|---|---|---|---|---|
| | | | Women | |
| | Total | Men | Working | Nonworking |
| | % | % | % | % |
| Base | 1019 | 402 | 345 | 269 |
| *Number of Visits* | | | | |
| 1 | 28 | 27 | 29 | 27 |
| 2 | 32 | 29 | 35 | 30 |
| 3 | 22 | 25 | 19 | 23 |
| 4 | 9 | 8 | 8 | 10 |
| 5 | 4 | 6 | 3 | 5 |
| 6 or more | 3 | 4 | 2 | 2 |
| Every 2 weeks | 2 | 1 | 2 | 1 |
| Average number of supermarket visits per week | 2.3 | 2.5 | 2.2 | 2.4 |

"Other" and "not sure" omitted in 1988.

## Saving Time in the Supermarket

For the second consecutive year, *Trends* investigated both how important it is for shoppers to save time in the supermarket and the means by which they do so (see Table 21). Consistent with last year's findings, just under two shoppers in five (37 percent) feel it is very important to save time; just over two in five (41 percent) feel it is somewhat important; and the remainder (21 percent) feel that saving time is not too or not at all important.

Compared with men and women not working outside the home, substantially more working women view saving time as very important. Similarly, a larger proportion of shoppers from households with two wage-earners view saving time as very important, compared with those where there is one spouse at home. Examining differences by household size, smaller proportions of shoppers from one- and two-person households consider saving time to be very or somewhat important, relative to those from households of five or more. Finally, looking at the effect of children on the value of saving time, smaller proportions of shoppers without children view saving time as somewhat or very important, compared with those who have children.

As shown in Table 22, from 1982 through 1988 the most frequently used methods for saving time while shopping have been:

- Taking packaged meat available rather than asking for a different cut.
- Looking only at items you know you need.
- Going to the supermarket at a particular time of day to avoid crowds.
- Buying larger quantities to avoid frequent shopping.
- Shopping at a particular supermarket because it has a better or faster checkout system.

Among those who practice time-saving measures pretty much every time they shop, in 1988 more than a third of shoppers "take packaged meat available rather than ask for a different cut" and "look only at items you know you need" (37 and 35 percent, respectively). Between a fourth and a third "buy larger quantities to avoid frequent shopping" and "go to the supermarket at a particular time of day to avoid crowds" (27 and 32 percent, respectively), and just under a fourth (23 percent) "shop at a particular supermarket because it has a better or faster checkout system."

**Table 21**

### How Important It Is to Save Time in the Supermarket

Base: The shopping public

Q: How important is it to you to save time when you shop? Would you say it is very important, somewhat important, not too important or not at all important?

| | | 1987 | | 1988 | | | | |
|---|---|---|---|---|---|---|---|---|
| | | Very Important | Somewhat Important | Very Important | Somewhat Important | Not Too Important | Not at All Important | Not Sure |
| Total | % | 39 | 41 | 37 | 41 | 16 | 5 | * |
| *Sex* | | | | | | | | |
| Men | % | 38 | 40 | 33 | 43 | 18 | 6 | 0 |
| Women | % | 39 | 41 | 38 | 41 | 15 | 5 | * |
| Working | % | 45 | 41 | 44 | 40 | 11 | 4 | * |
| Nonworking | % | 34 | 41 | 30 | 43 | 20 | 6 | * |
| *Married* | | | | | | | | |
| One spouse at home | % | 35 | 47 | 34 | 47 | 13 | 6 | 0 |
| Two wage-earners | % | 42 | 45 | 43 | 41 | 13 | 2 | * |
| *Size of Household* | | | | | | | | |
| 1 | % | 31 | 37 | 32 | 36 | 23 | 7 | 1 |
| 2 | % | 39 | 35 | 35 | 39 | 20 | 6 | 0 |
| 3 | % | 35 | 54 | 39 | 49 | 9 | 3 | 0 |
| 4 | % | 41 | 46 | 38 | 43 | 13 | 6 | 1 |
| 5 or more | % | 45 | 34 | 43 | 41 | 14 | 2 | 0 |
| *Type of Household* | | | | | | | | |
| With children | % | 42 | 44 | 39 | 45 | 12 | 4 | * |
| No children | % | 36 | 38 | 35 | 38 | 20 | 7 | * |

*Less than 0.5 percent.
May not add up to 100 percent due to rounding.

## Table 22 How Shoppers Save Time in the Supermarket

Base: The shopping public

Q: People do different things to save time when shopping. For each of the following, please tell me how often you personally do this to save time when grocery shopping. Do you (READ EACH ITEM) pretty much every time you shop, fairly often, only occasionally or never?

| | | 1982 | 1983 | 1984 | 1985 | 1986 | 1987** | 1988** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Pretty Much Every Time | Pretty Much Every Time | Pretty Much Every Time | Pretty Much Every Time | Pretty Much Every Time | Pretty Much Every Time | Pretty Much Every Time | Fairly Often | Only Occa-sion ally | Never | Not Sure |
| Take packaged meat available rather than ask for a different cut | % | 36 | 33 | 38 | 37 | 41 | 34 | 37 | 22 | 21 | 18 | * |
| Look only at items you know you need | % | 36 | 36 | 33 | 34 | 38 | 33 | 35 | 26 | 24 | 15 | 0 |
| Go to the supermarket at a particular time of day to avoid crowds | % | 30 | 30 | 28 | 31 | 31 | 29 | 32 | 26 | 21 | 20 | 0 |
| Buy larger quantities to avoid frequent shopping | % | 29 | 28 | 30 | 31 | 33 | 29 | 27 | 20 | 29 | 22 | 0 |
| Shop at a particular supermarket because it has a better or faster checkout system | % | 22 | 23 | 24 | 29 | 27 | 21 | 23 | 20 | 24 | 31 | * |
| Buy certain brands because they're more visible and easier to find | % | 11 | 12 | 10 | 13 | 14 | 9 | 10 | 19 | 36 | 35 | * |
| Go to a convenience store rather than a supermarket | % | 3 | 3 | 4 | 3 | 3 | 3 | 3 | 8 | 43 | 45 | 0 |

*Less than 0.5 percent.
**"Does not apply" omitted in 1987 and 1988.
"No response" omitted in 1988.

## Supermarkets versus Other Stores

Over the past year, the proportion of shoppers who buy non-food and specialty items at supermarkets remained relatively unchanged (see Table 23). More than half of all shoppers named their supermarkets as places for buying:

- Bakery goods.
- Fresh seafood.
- Paper goods.

Somewhat under half (46 percent) of all shoppers buy their magazines at supermarkets, and over a third (36 percent) go to the supermarket for nonprescription drugs. This is approximately the same proportion that buy their nonprescription drugs at a drugstore.

For several of the items shown in Table 23, the supermarket is a secondary source. Sources used more frequently than supermarkets are shown below by item:

| | |
|---|---|
| *Drugstore:* | Health and beauty aids.<br>Film.<br>Greeting cards.<br>Cosmetics.<br>Prescription drugs. |
| *Discount Store:* | Film.<br>Greeting cards.<br>Household repair and houseware items.<br>Cosmetics.<br>Toys. |
| *Other:* | Flowers and plants.<br>Toys. |

With few exceptions, between 1987 and 1988 the proportions of shoppers going to the supermarket for non-food and specialty items decreased marginally. Although the changes are not statistically significant, uniform declines of this nature warrant close scrutiny as indicators of a possible trend.

In light of the expansion of pharmacies within supermarkets, this year *Trends* asked shoppers whether they believe supermarket pharmacists are more, less or as qualified as the pharmacists in drug stores. As shown in Table 24, 75 percent feel that supermarket pharmacists are at least as qualified, somewhat less than one in five (16 percent) feel they are less qualified, while 5 percent feel they are more qualified. Looking at the different shopper segments, attitudes toward supermarket pharmacists appear to vary only by age and region. Specifically, shoppers 65 or older are less likely than those 18 to 49 to believe that supermarket pharmacists are as qualified as drugstore pharmacists. Compared with shoppers in the South, larger proportions of those in the West believe that supermarket pharmacists are as qualified as drugstore pharmacists.

## Table 23 Where Consumers Usually Shop for Various Items

Base: The shopping public

Q: Please tell me where you would usually shop for each of the following items — a supermarket, a convenience store, an all-purpose drugstore or a discount department store?

| | | 1982 | 1984 | 1985 | 1986 | 1987 | 1988** | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Super-market | Super-market | Super-market | Super-market | Super-market | Super-market | Conveni-ence store | Drug store | Dis-count store | Don't Shop | Other |
| Bakery goods | % | x | 71 | 75 | 76 | 82 | 80 | 3 | * | 1 | 2 | 13 |
| Fresh seafood | % | x | 53 | 64 | 62 | 69 | 67 | 2 | * | * | 11 | 17 |
| Paper goods | % | 61 | 55 | 57 | 60 | 67 | 64 | 2 | 8 | 21 | 0 | 3 |
| Magazines | % | 37 | 35 | 38 | 45 | 45 | 46 | 6 | 15 | 8 | 12 | 12 |
| Nonprescription drugs | % | x | 29 | 30 | 33 | 40 | 36 | 3 | 40 | 17 | 1 | 2 |
| Flowers and plants | % | x | 23 | 26 | 28 | 30 | 29 | 3 | * | 17 | 8 | 41 |
| Health and beauty aids | % | 23 | 21 | 23 | 24 | 27 | 27 | 3 | 45 | 21 | 1 | 2 |
| Tobacco products | % | x | x | x | x | 29 | 26 | 7 | 6 | 4 | 46 | 5 |
| Film | % | x | x | x | x | 19 | 19 | 5 | 33 | 30 | 3 | 9 |
| Greeting cards | % | 12 | 13 | 15 | 18 | 20 | 17 | 6 | 37 | 22 | * | 15 |
| Household repair and houseware items | % | 10 | 15 | 13 | 16 | 12 | 14 | 4 | 5 | 52 | 1 | 21 |
| Cosmetics | % | x | x | x | x | x | 14 | 2 | 33 | 32 | 8 | 9 |
| Prescription drugs | % | 4 | 6 | 6 | 7 | 11 | 11 | 1 | 78 | 5 | 1 | 3 |
| Toys | % | x | x | 2 | 3 | 3 | 2 | 3 | 2 | 64 | 11 | 15 |

x = Not asked.
*Less than 0.5 percent
**Split sample; bases = 508 and 511
"Not sure," "don't know," and "no response" omitted in 1988.

## Table 24 Consumers Evaluate Supermarket Pharmacists

Base: The shopping public

Q: Generally, do you feel that pharmacists in supermarkets are more qualified, as qualified or less qualified than pharmacists at drug stores?

| | Jan. 1988 Base | | Jan. 1988 More Qualified | Jan. 1988 As Qualified | Jan. 1988 Less Qualified | Jan. 1988 Not Sure |
|---|---|---|---|---|---|---|
| Total | **1019** | % | 5 | 70 | 16 | 9 |
| *Sex* | | | | | | |
| Men | **402** | % | 4 | 69 | 18 | 9 |
| Women | **617** | % | 5 | 71 | 15 | 9 |
| Working | **345** | % | 5 | 72 | 16 | 8 |
| Nonworking | **269** | % | 5 | 69 | 15 | 11 |
| *Type of Household* | | | | | | |
| With Children | **453** | % | 5 | 71 | 15 | 9 |
| No Children | **560** | % | 5 | 70 | 16 | 9 |
| *Age* | | | | | | |
| 18-24 | **82** | % | 3 | 77 | 19 | 1 |
| 25-39 | **407** | % | 5 | 77 | 12 | 7 |
| 40-49 | **162** | % | 6 | 71 | 13 | 10 |
| 50-64 | **214** | % | 6 | 65 | 18 | 12 |
| 65 or older | **128** | % | 4 | 58 | 24 | 14 |
| *Region* | | | | | | |
| East | **260** | % | 4 | 71 | 17 | 8 |
| Midwest | **277** | % | 5 | 70 | 15 | 11 |
| South | **310** | % | 6 | 66 | 18 | 9 |
| West | **172** | % | 3 | 78 | 11 | 8 |

# CHAPTER 4

## NUTRITIONAL CONTENT AND FOOD SAFETY

### Factors for Food Selection

Over the past six years *Trends* has tracked shopper concerns about the nutritional content of the foods they eat. Each year, overwhelming majorities have stated that they are somewhat or very concerned about the nutritional content of their food, yet each year from 1983 to 1987 the proportion of shoppers who are very concerned has declined (see Table 26). Between 1987 and 1988, for the first time since *Trends* began tracking nutrition-related issues, the proportion who are very concerned increased minimally from the 1987 level of 54 percent to a 1988 level of 56 percent. Although this change is not statistically significant, it may nonetheless indicate an end to the declining trend. The leveling off in concern may be due to shoppers having altered their behavior to the point where nutritional considerations are incorporated into food selection decisions.

In light of the apparent changes in attitudes toward nutrition and its importance as a topic for manufacturers and distributors, this year *Trends* investigated the effect of nutrition on shoppers' selection of foods. Specifically, shoppers were asked to state how important different food attributes are to them when they shop for food (see Table 25). As expected, "taste" is rated very important by the largest proportion of shoppers (88 percent). "Product safety" ranks second, while "nutrition" is third (83 and 72 percent, respectively). A significantly larger proportion of shoppers rank "nutrition" as very important relative to "price" and "ease of preparation." About two-thirds (65 percent) of shoppers rate "price" as very important, while somewhat more than half (53 percent) state that "storability" is very important. Fewer than two shoppers in five (39 percent) consider "ease of preparation" to be very important. Among those who rate each item as very or somewhat important, at 98 percent, "taste," "product safety," and "nutrition" appear in identical proportions. These findings suggest that for almost all shoppers, nutrition plays a major role in the selection of food items.

**Table 25** **Importance of Various Factors in Food Selection**

Base: The shopping public

Q: Now I'm going to read a list of factors that may or may not be important when a person shops for food. For each factor, please tell me whether it is very important, somewhat important, not too important or not at all important to you when you shop for food.

| | | Very Important | Somewhat Important | Not Too Important | Not at All Important | Not Sure |
|---|---|---|---|---|---|---|
| Taste | % | 88 | 10 | 1 | * | * |
| Product safety | % | 83 | 15 | 2 | * | 1 |
| Nutrition | % | 72 | 26 | 2 | 1 | * |
| Price | % | 65 | 32 | 3 | 1 | 0 |
| Storability | % | 53 | 39 | 5 | 1 | 1 |
| Ease of preparation | % | 39 | 48 | 10 | 2 | 1 |

*Less than 0.5 percent.
May not add up to 100 percent due to rounding.

## Nutritional Content

During the past year, the most dramatic changes in concern about nutrition occurred across age categories. The proportion of shoppers aged 18 to 24 who are very concerned dropped 8 points to a new low of 33 percent. Conversely, in the 50- to 64-year-old group, the proportion who are very concerned increased 6 points to 66 percent. Consistent with previous years, levels of concern about nutrition increase with age. Whereas about a third of 18- to 24-year-olds are very concerned, about half of 25- to 49-year-olds are very concerned, as are over two-thirds of shoppers 50 or older.

As noted earlier, between 1987 and 1988, the proportion of shoppers who are "very concerned" about the nutritional content of the foods they eat increased minimally to 56 percent (see Table 26). Consistent with the findings in 1987, almost all shoppers are "very" or "somewhat concerned" about nutritional content (93 percent).

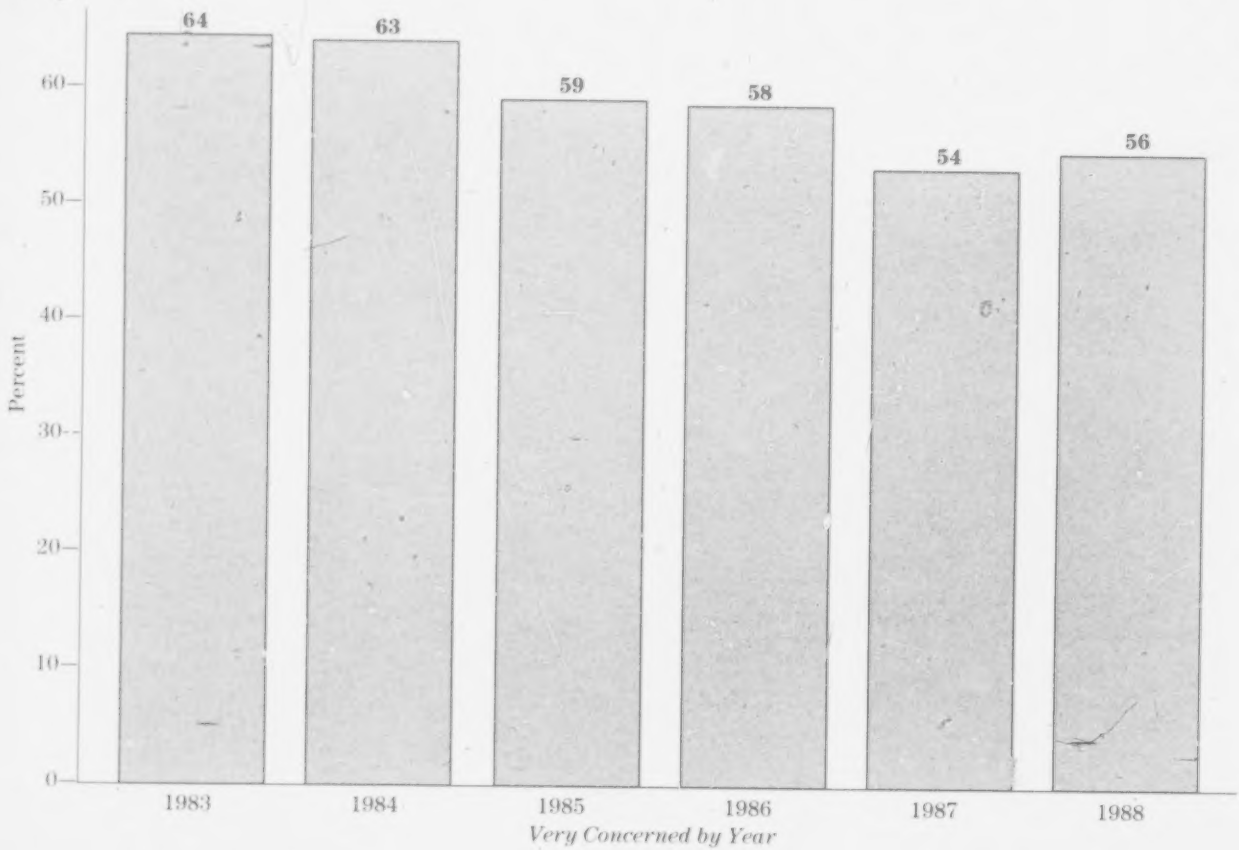
In comparison to women not working outside the home, smaller proportions of men and working women are very concerned about nutrition. Almost two-thirds (64 percent) of women not working are very concerned, as opposed to about half of men and working women (48 and 53 percent, respectively). Surprisingly, in households where there are no children a larger proportion of shoppers are very concerned about nutrition than in those where there are children (59 versus 52 percent).

As shown in Table 27, of those shoppers who express any concern about the nutritional content of the foods they eat, at least one shopper in five is most concerned about:

- Fat content/low fat (27 percent).
- Salt/sodium content/less salt (26 percent).
- Cholesterol levels (22 percent).
- Vitamin/mineral content (21 percent).
- Sugar content/less sugar (20 percent).

Since 1983, shopper concern over fat content and cholesterol levels have shown dramatic increases (18 and 17 percentage points, respectively). The largest changes for each, however, occurred over the past year, with concern over fat content increasing 11 percentage points and that for cholesterol levels increasing 8 points. Concern over salt or sodium content increased 8 percentage points from 1983 to 1988, with half of the increase occurring in the past year. By contrast, the proportions naming vitamin and mineral content and sugar content have remained relatively steady since 1983. Concern over freshness increased from 8 percent to 15 percent, mirroring the increasing importance of fresh foods.

**Level of Shoppers' Concern About the Nutritional Content of Foods 1983-1988**



## Table 26 Level of Shopper Concern About the Nutritional Content of Foods

Base: The shopping public

Q: Would you say you and your family are very concerned, somewhat concerned, not very concerned or not at all concerned about the nutritional content of the food you eat?

| | | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Very Concerned | Very Concerned | Very Concerned | Very Concerned | Very Concerned | Very Concerned | Somewhat Concerned | Not Very/ Not at All Concerned | Not Sure |
| Total | % | 64 | 63 | 59 | 58 | 54 | 56 | 37 | 6 | * |
| *Sex* | | | | | | | | | | |
| Men | % | 62 | 62 | 51 | 55 | 48 | 48 | 41 | 11 | * |
| Women | % | 65 | 64 | 60 | 58 | 55 | 58 | 36 | 6 | * |
| Working | % | 63 | 64 | 60 | 54 | 49 | 53 | 41 | 6 | * |
| Nonworking | % | 68 | 63 | 62 | 62 | 62 | 64 | 30 | 6 | * |
| *Type of Household* | | | | | | | | | | |
| With Children | % | 65 | 62 | 62 | 57 | 52 | 52 | 41 | 7 | * |
| No Children | % | 63 | 64 | 56 | 58 | 55 | 59 | 33 | 7 | * |
| *Age* | | | | | | | | | | |
| 18-24 | % | 61 | 51 | 52 | 55 | 41 | 33 | 54 | 14 | 0 |
| 25-39 | % | 64 | 58 | 56 | 54 | 47 | 51 | 42 | 8 | 0 |
| 40-49 | % | 61 | 67 | 63 | 49 | 54 | 52 | 40 | 7 | 1 |
| 50-64 | % | 68 | 71 | 62 | 68 | 60 | 66 | 30 | 3 | 0 |
| 65 and older | % | 65 | 67 | 58 | 65 | 69 | 72 | 20 | 7 | 1 |
| *Region* | | | | | | | | | | |
| East | % | 67 | 66 | 65 | 58 | 58 | 54 | 40 | 5 | 1 |
| Midwest | % | 56 | 63 | 53 | 53 | 49 | 52 | 40 | 8 | * |
| South | % | 66 | 62 | 59 | 59 | 56 | 60 | 32 | 7 | 1 |
| West | % | 69 | 59 | 57 | 62 | 53 | 56 | 36 | 7 | 0 |

*Less than 0.5 percent.
May not add up to 100 percent due to rounding.

## Table 27 Nature of Shopper Concern About the Nutritional Content of Foods (Volunteered)

Base: Those who are very, somewhat or not very concerned about the nutritional content of what they eat

Q: What is it about the nutritional content of what you eat that concerns you and your family most?

| | 1983 Total | 1984 Total | 1985 Total | 1986 Total | 1987 Total | 1988 Total | 1987-1988 Percentage Point Change |
|---|---|---|---|---|---|---|---|
| | % | % | % | % | % | % | % |
| Fat content, low fat | 9 | 8 | 13 | 17 | 16 | 27 | +11 |
| Salt/sodium content, less salt | 18 | 17 | 19 | 20 | 22 | 26 | + 4 |
| Cholesterol levels | 5 | 8 | 10 | 13 | 14 | 22 | + 8 |
| Vitamin/mineral content | 24 | 19 | 17 | 22 | 21 | 21 | 0 |
| Sugar content, less sugar | 21 | 22 | 20 | 18 | 16 | 20 | + 4 |
| Preservatives | 22 | 17 | 13 | 15 | 14 | 16 | + 2 |
| Freshness, purity, no spoilage | 14 | 12 | 8 | 8 | 8 | 15 | + 7 |
| Calories, low calories | 6 | 9 | 9 | 11 | 14 | 14 | 0 |
| Food/nutritional value | 10 | 19 | 14 | 11 | 13 | 14 | + 1 |
| Chemical additives | 27 | 25 | 18 | 16 | 10 | 12 | + 2 |
| Making sure we get a balanced diet | 10 | 9 | 11 | 14 | 14 | 11 | - 3 |
| Ingredients/content | 0 | 0 | 0 | 0 | 0 | —8 | + 8 |
| Desire to be healthy/eat what's good for us | 0 | 0 | 3 | 6 | 7 | 7 | 0 |
| Empty calories, junk food | 4 | 4 | 5 | 2 | 7 | 6 | - 1 |
| Protein value | 5 | 6 | 4 | 5 | 4 | 6 | + 2 |
| Fiber content | 2 | 1 | 2 | 3 | 4 | 5 | + 1 |
| Chemicals | 0 | 0 | 0 | 0 | 0 | 4 | + 4 |
| As natural as possible, not overly processed | 12 | 6 | 5 | 3 | 0 | 4 | + 4 |
| Processed foods | 0 | 0 | 0 | 0 | 0 | 3 | + 3 |
| Carbohydrate content | 1 | 2 | 2 | 2 | 2 | 3 | + 1 |
| Less frying/more broiling | 0 | 0 | 0 | 0 | 0 | 2 | + 2 |
| Excess food coloring, dyes | 6 | 4 | 3 | 2 | 3 | 0 | - 3 |
| No harmful ingredients, nothing that causes illness/cancer | 10 | 6 | 5 | 5 | 0 | 0 | 0 |
| Starch content | 1 | 1 | 1 | 1 | 0 | 0 | 0 |
| Quality of food | 3 | 5 | 1 | 1 | 0 | 0 | 0 |
| Less red meat | 0 | 0 | 2 | 2 | 0 | 0 | 0 |
| Artificial sweetener | 0 | 0 | 2 | 1 | * | 0 | * |
| Don't know/refused | 5 | 5 | 6 | 5 | 7 | 2 | - 5 |

*Less than 0.5 percent.

## Nutrition-Related Behavior

As shown in Table 28, the proportion of shoppers who frequently practice nutrition-related behaviors has changed little since 1987. More than two-thirds of all shoppers frequently select foods to balance their families' diet and serve nutritional snacks, such as fruits and vegetables (69 and 67 percent, respectively). Somewhat less than half frequently check labels for caloric content and for protein and fat content (48 and 46 percent, respectively), and about two in five (40 percent) frequently select recipes for their nutritional content.

Given the concern over salt and sodium content, this year's *Trends* investigated how frequently shoppers check foods for salt or sodium content. Consistent with the high proportion of shoppers who name salt or sodium content as a concern, over half (54 percent) frequently check for these items.

As in previous years, the proportions expressing concern over calories are inconsistent with the proportions who claim to check labels for caloric content. In 1988, one in seven shoppers who expressed concern about nutrition named calories as a specific concern (see Table 27). About half of all shoppers, however, frequently check labels for caloric content, and fully three-quarters frequently or occasionally check for calories.

**Table 28** **Consumer Behavior Related to Nutrition**

Base: The shopping public

Q: How often do you (READ EACH ITEM) — frequently, occasionally, rarely or never?

| | | 1984 | 1985 | 1986 | 1987 | 1988 | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Frequently | Frequently | Frequently | Frequently | Frequently | Occasionally | Rarely | Never | Not Sure |
| Select foods to balance your family's diet | % | 76 | 70 | 72 | 72 | 69 | 21 | 5 | 4 | * |
| Serve nutritional snacks, such as fruits and vegetables | % | 76 | 72 | 73 | 70 | 67 | 24 | 5 | 4 | * |
| Check for salt or sodium content | % | x | x | x | x | 54 | 21 | 13 | 12 | * |
| Check label for caloric content | % | x | x | x | 47 | 48 | 27 | 12 | 13 | 1 |
| Check food labels for protein and fat content | % | 44 | 45 | 47 | 44 | 46 | 28 | 16 | 10 | 0 |
| Select recipes for their nutritional content | % | 48 | 40 | 44 | 42 | 40 | 31 | 15 | 14 | * |

x = Not asked.
*Less than 0.5 percent.
May not add up to 100 percent due to rounding.

## Food Preparation Behavior

For the second year in a row, in 1988 *Trends* examined changes in the way shoppers have been cooking or preparing foods. Consistent with last year, two-thirds (67 percent) of the shoppers state that over the past three to five years they are cooking or preparing foods differently from the way they used to (see Table 29). Compared with women, men are less likely to have changed the way they cook or prepare foods. Somewhat more than half (55 percent) of men have changed their behavior, compared with seven women in ten (70 percent). As in 1987, the presence of children in the household appears to have no effect on changes in food preparation.

Among different age groups, the proportion of 50- to 64-year-olds who have changed their behavior increased 9 points this year to 73 percent. Relative to those under 40 and 65 or older, in 1988 shoppers age 50 to 64 stand out as significantly more likely to have changed their food preparation behavior.

Regionally, shoppers in the West showed a significant increase in changed behavior over the past year. Whereas in 1987, 58 percent claimed to have changed their food preparation behavior, the proportion increased to 69 percent in 1988.

As shown in Table 30, of those who have changed their food preparation behavior, the most common changes have included:

- Less salt (40 percent).
- Less frying (35 percent).
- Less added fat (29 percent).
- More broiling (20 percent).
- Eating more vegetables/fresh foods (20 percent).

Compared with last year, there have been dramatic increases in the proportions of shoppers who have changed their food preparation behavior to include:

- Less salt (21 percentage point increase).
- Eating more vegetables/fresh foods (12 point increase).
- Less sugar (10 point increase).
- Less cholesterol (9 point increase).
- Eating less red meat (8 point increase).
- Baking/roasting more (6 point increase.)

These changes in behavior are consistent with the nutritional concerns shown in Table 27. Specifically, since 1987 increasing proportions of respondents who are concerned about nutrition name salt and fat content, cholesterol levels, and freshness as issues of particular concern. The only notable decrease occurred among the proportion of shoppers who microwave more (8 percentage point decrease). This decrease, however, does not necessarily indicate a decline in the total proportion of shoppers who microwave their food. Rather, it may indicate a decreased *growth rate* in those who microwave.

Similar proportions of men and women have instituted the same changes. Slightly more women, however, have been eating more vegetables and fresh foods, using less sugar and broiling more.

## Table 29 Consumer Behavior Related to Food Preparation

Base: The shopping public

Q: In the past three to five years, have you been cooking or preparing foods differently than you used to?

| | | Jan. 1987 Yes | Jan. 1988 Yes | Jan. 1988 No | Jan. 1988 Not Sure |
|---|---|---|---|---|---|
| Total | % | 64 | 67 | 32 | 1 |
| *Sex* | | | | | |
| Men | % | 56 | 55 | 43 | 2 |
| Women | % | 66 | 70 | 29 | * |
| Working | % | 66 | 71 | 28 | * |
| Nonworking | % | 66 | 68 | 31 | 1 |
| *Type of Household* | | | | | |
| With Children | % | 63 | 64 | 35 | 1 |
| No Children | % | 65 | 69 | 30 | 1 |
| *Age* | | | | | |
| 18-24 | % | 56 | 60 | 38 | 1 |
| 25-39 | % | 59 | 65 | 35 | 1 |
| 40-49 | % | 71 | 71 | 28 | * |
| 50-64 | % | 64 | 73 | 26 | 1 |
| 65 or older | % | 70 | 65 | 34 | 2 |
| *Region* | | | | | |
| East | % | 68 | 67 | 32 | 1 |
| Midwest | % | 65 | 69 | 30 | * |
| South | % | 64 | 64 | 35 | 1 |
| West | % | 58 | 69 | 29 | 2 |

*Less than 0.5 percent.
May not add up to 100 percent due to rounding.

## Table 30 How Consumers Prepare Foods Differently from Three to Five Years Ago (Volunteered)

Base: Those who cook or prepare foods differently from three to five years ago

Q: How are you cooking or preparing foods differently?

| | | Jan. 1987 | Jan. 1988 | | |
|---|---|---|---|---|---|
| | | Total | Total | Men | Women |
| Base | | 623 | 682 | 112 | 571 |
| Less salt | % | 19 | 40 | 36 | 41 |
| Less frying | % | 33 | 35 | 30 | 36 |
| Less added fat | % | 25 | 29 | 26 | 29 |
| More broiling | % | 24 | 20 | 14 | 21 |
| Eating more vegetables/fresh foods | % | 8 | 20 | 13 | 21 |
| Less cholesterol | % | 9 | 18 | 16 | 19 |
| More microwaving | % | 25 | 17 | 18 | 17 |
| Less sugar | % | 7 | 17 | 8 | 19 |
| Eating less red meat | % | 7 | 15 | 12 | 16 |
| Baking/roasting more | % | 7 | 13 | 11 | 14 |
| More steaming | % | 9 | 10 | 10 | 10 |
| Fewer calories | % | 2 | 7 | 6 | 7 |
| Wider variety/more recipes | % | 2 | 5 | 5 | 5 |
| Using fast foods/prepared foods | % | 1 | 5 | 2 | 5 |
| Changing spices or seasoning | % | 3 | 4 | 5 | 4 |
| Eating more fruit | % | 0 | 4 | 1 | 4 |
| More margarine | % | 3 | 3 | 1 | 3 |
| Eating less/smaller quantities | % | 2 | 3 | 2 | 3 |
| Changing length of cooking time | % | 1 | 3 | 4 | 3 |
| Eating more chicken | % | 0 | 3 | 2 | 3 |
| Eating more fish | % | 0 | 2 | 3 | 2 |
| Eating more nutritionally/balanced diet | % | 0 | 2 | 2 | 3 |
| Consumption of desserts | % | 0 | 2 | 1 | 2 |
| Using a barbecue or outdoor grill | % | 1 | 1 | 3 | * |
| Fewer sauces | % | 2 | * | 0 | * |
| Other | % | 20 | 23 | 30 | 22 |
| Not sure | % | 2 | 1 | 2 | 1 |

*Less than 0.5 percent.
"No response" omitted in 1988.

## Ensuring Food Safety

As shown in Table 31, there were no changes over the past year in the proportions of shoppers who rely on themselves, on the federal government and on consumer organizations to ensure the safety of their food. Somewhat less than half (45 percent) rely on themselves, about a fourth (26 percent) on the federal government and about one in seven (15 percent) relies on consumer organizations. Notably, the percentage who rely on consumer organizations stabilized in 1988 after a 6-point increase in 1987. Consistent with previous years, relatively small proportions of shoppers rely on retailers for ensuring food safety.

**Table 31** **Those Whom Shoppers Rely on to Ensure the Products They Buy Are Safe**

Base: The shopping public

Q: As far as you personally are concerned, whom do you rely on most to be sure that the products you buy are safe — the federal government, the state government, consumer organizations, manufacturers, retailers or yourself as an individual?

| | Total | | | | | |
|---|---|---|---|---|---|---|
| | 1983 | 1984 | 1985 | 1986 | 1987** | **1988*** ** |
| | % | % | % | % | % | % |
| Yourself as an individual | 46 | 48 | 38 | 48 | 45 | **45** |
| Federal government | 24 | 22 | 31 | 29 | 25 | **26** |
| Consumer organizations | 6 | 9 | 8 | 9 | 15 | **15** |
| Manufacturers | 13 | 11 | 7 | 8 | 9 | **7** |
| State government | 3 | 3 | 6 | 4 | 3 | **3** |
| Retailers | 5 | 5 | 6 | 2 | 5 | **3** |
| Other (Vol.) | * | 1 | 1 | * | 1 | **1** |
| None (Vol.) | 1 | * | 1 | * | * | * |
| Not sure | 2 | 1 | 2 | * | 2 | **2** |

*Less than 0.5 percent.
**Split sample; base = 498.
***Split sample; base = 511.
May not add up to 100 percent due to rounding.

## Takeout Food and Eating Out

When meals are eaten at home, but not prepared at home, about equal proportions of shoppers buy the meal at a fast-food store or a restaurant (41 and 38 percent, respectively) (see Table 32). As in 1987, about one shopper in ten (11 percent) this year buys a takeout meal from a carryout section of a supermarket. Since 1987, the proportion of shoppers who buy their takeout meals from the carryout section of a restaurant increased significantly from 33 percent to 38 percent. A minor increase occurred in the proportion who buy meals from the carryout section of a supermarket, while a minor decrease occurred in those who buy meals from a fast-food store. While neither of these changes are statistically significant, they may be noteworthy for future tracking.

Higher proportions of shoppers from households with four or more buy their takeout meals from a fast-food store, relative to those from one- and two-person households. Shoppers from one- and three-person households are as likely to go to a fast-food store as they are to go to a carryout section of a restaurant, while those from households with four or more are more likely to go to a fast-food store than the carryout section of a restaurant. Shoppers from households consisting of two people are more likely to go to the carryout section of a restaurant than to a fast-food store.

When food is eaten out, about three shoppers in ten (29 percent) say they are very concerned about the ingredients of their food (see Table 33). About half (51 percent) are somewhat concerned and one shopper in five (20 percent) is not very or not at all concerned. Higher proportions of women not working outside the home than men are very concerned about their food's ingredients. Finally, higher proportions of shoppers without children are very concerned about food ingredients than are those with children. This is consistent with the finding that those with children are *generally* less concerned about nutrition (see Table 26).

### Table 32 Source of Takeout Food

Base: The shopping public

Q: When meals are eaten at home, but not prepared at home, where do you usually buy the food? Would you say most often from a fast-food store, a carryout section of a restaurant, a carryout section of a supermarket or from some other place?

| | Jan. 1986 Total | Jan. 1987 Total | Jan. 1988 Total | Jan. 1988 Size of Household 1 | 2 | 3 | 4 | 5 or more |
|---|---|---|---|---|---|---|---|---|
| Base | 1004 | 1007 | 1019 | 158 | 360 | 181 | 194 | 122 |
| | % | % | % | % | % | % | % | % |
| Fast-food store | 43 | 44 | 41 | 37 | 30 | 43 | 52 | 57 |
| Carryout section of a restaurant | 38 | 33 | 38 | 31 | 45 | 39 | 37 | 32 |
| Carryout section of a supermarket | 10 | 9 | 11 | 17 | 12 | 12 | 5 | 11 |
| Some other place | 2 | 7 | 3 | 3 | 6 | 3 | 3 | * |
| It varies (Vol.) | 1 | 1 | 1 | 1 | 2 | 1 | 1 | 0 |
| Not sure | 3 | 3 | 4 | 10 | 5 | 2 | 2 | 1 |

*Less than 0.5 percent.
"No response" omitted in 1988.

## Table 33 Concern About Food Ingredients When Eating Out

Base: The shopping public

Q: When you eat out, how concerned are you about the food's ingredients? Would you say very concerned, somewhat concerned, not very concerned or not at all concerned?

| | | 1986 | 1987** | 1988*** | | | | |
|---|---|---|---|---|---|---|---|---|
| | | Very Concerned | Very Concerned | Very Concerned | Somewhat Concerned | Not Very Concerned | Not at All Concerned | Not Sure |
| Total | % | 28 | 31 | 29 | 51 | 14 | 6 | * |
| *Sex* | | | | | | | | |
| Men | % | 29 | 26 | 28 | 49 | 14 | 8 | * |
| Women | % | 27 | 32 | 30 | 51 | 14 | 5 | * |
| Working | % | 27 | 28 | 25 | 57 | 13 | 6 | 0 |
| Nonworking | % | 28 | 35 | 36 | 42 | 15 | 5 | 1 |
| *Type of Household* | | | | | | | | |
| With Children | % | 25 | 29 | 21 | 58 | 15 | 5 | 1 |
| No Children | % | 30 | 33 | 36 | 45 | 13 | 6 | 0 |

*Less than 0.5 percent.
**Split sample; base = 509.
***Split sample; base = 508.
May not add up to 100 percent due to rounding.

## Consumer Behavior and Food Safety

As shown in Table 34, in 1988 over three-quarters of all shoppers identified very closely with the statements that they:

- Usually check the packaging on the foods they buy to make sure it is in good condition (89 percent).
- Almost always check the dates on dated foods (79 percent).
- Prefer to buy an item that has tamper-resistant packaging, if there is a choice (76 percent).

Over half identified closely with the statements that they:

- Feel the food in supermarkets is wholesome and safe to eat (55 percent).
- Feel concerned that some ingredients added to processed foods may be harmful or unsafe to eat (53 percent).
- Avoid buying certain foods because they are concerned about whether they are safe (52 percent).

Finally, about two shoppers in five (39 percent) identified closely with the statement that they pay a good deal of attention to the list of ingredients on food labels.

Consistent with previous years, nearly all shoppers (93 percent) feel the food in supermarkets is wholesome and safe to eat, combining those who identify somewhat or very closely with the statement. Similar proportions identify somewhat or very closely with the statements that they always check the dates on dated foods, and prefer to buy items with tamper-resistant packaging, if given a choice (92 percent each). Almost all shoppers (98 percent) identify somewhat or very closely with the statement that they usually check the packaging on the foods they buy to make sure it is in good condition.

When compared with 1987, the proportions of shoppers identifying very closely with each statement remained relatively constant. Minimal increases occurred, however, among those who avoid buying certain foods due to safety concerns (4 percentage point increase), and among those who pay attention to the list of ingredients on food labels (6 percentage point increase).

**Table 34** **Consumer Behavior and Food Safety**

Base: The shopping public

Q: The following are statements that people have made. For each one, please tell me how close it comes to describing you — very close, somewhat close, not very close or not close at all.

| | | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Very Close | Very Close | Very Close | Very Close | Very Close | Very Close | Some-what Close | Not Very Close | Not at All Close | Not Sure |
| I usually check the packaging on the foods I buy to make sure it is in good condition | % | 85 | 87 | 88 | 88 | 86 | 89 | 9 | 1 | * | * |
| I almost always check the dates on dated foods | % | 76 | 79 | 78 | 80 | 78 | 79 | 13 | 5 | 3 | * |
| If there is a choice, I prefer to buy an item that has tamper-resistant packaging | % | x | x | x | x | 76 | 76 | 16 | 5 | 2 | 1 |
| I feel the food in supermarkets is wholesome and safe to eat | % | x | x | 58 | 58 | 56 | 55 | 38 | 5 | 1 | * |
| I feel concerned that some ingredients added to processed foods may be harmful or unsafe to eat | % | 50 | 47 | 48 | 46 | 50 | 53 | 27 | 12 | 7 | 1 |
| I avoid buying certain foods because I am concerned about whether they are safe | % | 46 | 46 | 46 | 45 | 48 | 52 | 23 | 15 | 10 | 1 |
| I pay a good deal of attention to the list of ingredients on food labels | % | 41 | 40 | 40 | 41 | 33 | 39 | 32 | 18 | 11 | * |

*Less than 0.5 percent.
x = Not asked.
May not add up to 100 percent due to rounding.

## Concerns About Specific Food Attributes

Since 1984, "residues such as pesticides and herbicides" has led the list of potential hazards in the proportions of shoppers who consider them to be a serious hazard (see Table 35). In 1988, 95 percent of all shoppers considered residues to be a serious hazard or something of a hazard. Fully three-fourths (75 percent) considered them to be a serious hazard.

Over the past year, the proportions of shoppers who view "antibiotics and hormones in poultry and livestock," "salt in food" and "sugar in food" as serious hazards remained relatively constant. Significant increases occurred among those naming "fats," "cholesterol" and "nitrites in food." The proportion viewing "fats" as a serious hazard increased 6 percentage points, while those naming "cholesterol" and "nitrites in food" increased 8 and 6 percentage points respectively. Those considering "irradiated foods" and "additives and preservatives" to be serious hazards declined slightly to 1988 levels of 36 and 29 percent, respectively.

Shoppers' attitudes toward fats, cholesterol and salt as health hazards are consistent with their nutritional concerns and the ways in which they have changed their food preparation behavior. As shown in Table 27, fat, cholesterol and salt or sodium levels lead the list of nutritional concerns among those who are at all concerned about the nutritional content of foods. Table 30 shows that among shoppers who have changed their food preparation behavior, large proportions are using less salt, frying less, using less added fat, broiling more and reducing cholesterol.

In 1988 for the first time, *Trends* examined the potential impact of government labeling on foods that are irradiated. All respondents who considered irradiated foods to be a serious hazard or somewhat of a hazard were asked how their attitude might change if irradiated foods contained a label stating that the irradiation levels met government safety standards. As shown in Table 36, somewhat more than two shoppers in five (44 percent) would not be affected by the label; somewhat more than a fourth (28 percent) would be reassured by the label; and about one in five (21 percent) would consider the food more hazardous if the label were present.

Examining the effect of labeling on different types of shoppers reveals few differences due to the presence of children in the household or by region. Across sex and age categories, however, major differences exist. Significantly larger proportions of women over men are likely to be unaffected by a label (47 percent versus 30 percent). Shoppers in the 18- to 24-year-old category stand out as the most likely to view labeled foods as more hazardous than if no label were affixed, and are less likely than 25- to 49-year olds to be unaffected by a label.

**Table 35** **Consumer Concern About Selected Food Attributes: 1984-1988**

Base: The shopping public

Q: How concerned are you about the following items? Would you say that (READ EACH ITEM) is/are a serious health hazard, somewhat of a hazard or not a hazard at all?

| | | 1984 | 1985 | 1986 | 1987* | 1988** | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | Serious Hazard | Serious Hazard | Serious Hazard | Serious Hazard | Serious Hazard | Something of a Hazard | Not a Hazard at All | Not Sure |
| Residues, such as pesticides and herbicides | % | 77 | 73 | 75 | 76 | 75 | 20 | 4 | 2 |
| Antibiotics and hormones in poultry and livestock | % | x | x | x | 61 | 61 | 28 | 6 | 5 |
| Fats | % | x | 42 | 44 | 55 | 61 | 35 | 4 | 1 |
| Cholesterol | % | 45 | 44 | 48 | 51 | 59 | 35 | 4 | 1 |
| Salt in food | % | 37 | 39 | 40 | 43 | 42 | 49 | 8 | 1 |
| Irradiated foods | % | x | x | 37 | 43 | 36 | 29 | 10 | 24 |
| Nitrites in food | % | x | x | x | 38 | 44 | 38 | 6 | 12 |
| Additives and preservatives | % | 32 | 36 | 33 | 36 | 29 | 61 | 7 | 3 |
| Sugar in food | % | 31 | 29 | 29 | 28 | 28 | 60 | 12 | 1 |
| Artificial coloring | % | 26 | 28 | 26 | 24 | 21 | 50 | 25 | 4 |

x = Not asked.
*Split sample; bases = 498 and 509.
**Split sample; bases = 508 and 511.
May not add up to 100 percent due to rounding.

## Table 36 Effect of Government Labeling on Irradiated Foods

Base: Those who consider irradiated foods to be a serious hazard or something of a hazard.**

Q: If irradiated foods contained labels stating that irradiation levels meet government safety standards, would you consider irradiated foods?

| | Jan. 1988 Base | | Jan. 1988 Less Hazardous | Jan. 1988 As Hazardous As If There Were No Label | Jan. 1988 More Hazardous | Jan. 1988 Not Sure |
|---|---|---|---|---|---|---|
| Total | **331** | % | 28 | 44 | 21 | 8 |
| *Sex* | | | | | | |
| Men | **125** | % | 35 | 30 | 28 | 6 |
| Women | **206** | % | 26 | 47 | 19 | 8 |
| Working | **115** | % | 27 | 43 | 21 | 10 |
| Nonworking | **90** | % | 26 | 51 | 17 | 7 |
| *Type of Household* | | | | | | |
| With Children | **165** | % | 30 | 45 | 17 | 8 |
| No Children | **163** | % | 26 | 42 | 24 | 8 |
| *Age* | | | | | | |
| 18-24 | **29** | % | 26 | 24 | 37 | 14 |
| 25-39 | **143** | % | 29 | 49 | 14 | 7 |
| 40-49 | **53** | % | 30 | 46 | 20 | 4 |
| 50-64 | **66** | % | 24 | 47 | 24 | 5 |
| 65 or older | **30** | % | 26 | 34 | 23 | 17 |
| *Region* | | | | | | |
| East | **88** | % | 28 | 52 | 13 | 7 |
| Midwest | **88** | % | 25 | 38 | 26 | 10 |
| South | **103** | % | 34 | 37 | 22 | 7 |
| West | **52** | % | 20 | 52 | 22 | 6 |

**Split sample.
"No response" omitted in 1988.

# CHAPTER 5

## SERVICE AT THE SUPERMARKET

### Consumer Definitions of Service

For the first time this year, *Trends* examined the concept of "service" at the supermarket. Specifically, shoppers were asked what they consider to be *good* service. As shown in Table 37, their ideas of good service range from creating a pleasant shopping environment to ensuring low prices. Items named most frequently as indicators of good service include:

- Courteous/helpful/efficient employees (52 percent).
- Fast service/"checkout" (32 percent).
- Availability of products/well stocked (26 percent).

Other features named by at least one shopper in ten include:

- Good/competitive/bargain prices (19 percent).
- Quality products/food (17 percent).
- A clean supermarket (17 percent).
- Friendly/comfortable atmosphere (15 percent).
- Products that are fresh (13 percent).
- Good store layout/products easily located (13 percent).
- Large selection/variety of products (12 percent).

Comparing definitions of good service between men and women shows that more men name "fast service/'checkout' " and "large selection/variety of products," while more women name "courteous/helpful/efficient employees," "availability of products/well stocked" and "a clean supermarket." Compared with working women, a smaller proportion of women not working outside the home identify "fast service/'checkout' " as an attribute of good service, while a somewhat larger proportion of nonworking women identify "quality products/food" as an attribute of good service.

As a measure of how well supermarkets are performing on service, shoppers were asked to rate the overall service at their principal supermarket. As shown in Table 38, shoppers are generally pleased with the service, giving an average rating of 8.1 on a scale of one to ten. This compares to an average rating of 7.9 for supermarket performance as a whole (see Table 4). As discussed in Chapter 1, satisfaction with supermarket service is the best indicator of overall satisfaction.

A look at different shopper segments reveals that larger proportions of women not working outside the home rate their supermarkets "nine" or "ten," compared with working women and men (53 percent, versus 43 and 30 percent). The presence or absence of children in the household appears to have no effect on supermarket service ratings. Larger proportions of shoppers from households with one, three or four members, however, rate their supermarkets "nine" or "ten," compared with those from households with five or more. Relative to shoppers who are 18 to 24 or 40 to 64, larger proportions of those who are at least 65 rate their supermarkets "nine" or "ten." Similarly, those in the 40 to 49 age range are more likely to be pleased with the service provided by their supermarkets than those under 25. Finally, across income groupings, shoppers with household incomes of $15,001 to $25,000 are more likely to rate their supermarkets "nine" or "ten" than those earning $7,500 or less.

## Table 37 Definitions of Service (Volunteered)

Base: The shopping public

Q: When you think of a supermarket providing good service, what does that mean to you?

| | Jan. 1988 | | | | |
|---|---|---|---|---|---|
| | | | | Women | |
| | Total | Men | Total | Working | Nonworking |
| Base | 1019 | 402 | 617 | 345 | 269 |
| | % | % | % | % | % |
| Courteous/helpful/efficient employees | 52 | 44 | 55 | 55 | 54 |
| Fast service/"checkout" | 32 | 39 | 30 | 34 | 26 |
| Availability of products/well stocked | 26 | 19 | 28 | 30 | 25 |
| Good/competitive/bargain prices | 19 | 21 | 19 | 17 | 21 |
| Quality products/food | 17 | 14 | 18 | 14 | 21 |
| A clean supermarket | 17 | 13 | 18 | 20 | 15 |
| Friendly/comfortable atmosphere | 15 | 18 | 15 | 14 | 14 |
| Products that are fresh | 13 | 11 | 13 | 11 | 15 |
| Good store layout/products easily located | 13 | 12 | 14 | 15 | 12 |
| Large selection/variety of products | 12 | 17 | 11 | 11 | 12 |
| Important that the service be good | 9 | 11 | 9 | 7 | 11 |
| "Carryout" service | 7 | 4 | 7 | 8 | 7 |
| Good advertising | 4 | 3 | 5 | 6 | 3 |
| The availability of baggers | 3 | 2 | 3 | 3 | 3 |
| Brand products being available | 3 | 2 | 3 | 3 | 3 |
| Convenient location | 2 | 3 | 2 | 2 | 1 |
| Convenience | 2 | 5 | 2 | 2 | 1 |
| Other | 14 | 20 | 13 | 14 | 11 |
| Not sure | 1 | 1 | 1 | 1 | 1 |

## Table 38 Consumers Evaluate Service at Their Principal Supermarket

Q: Overall, how would you rate the service at the supermarket where you shop most often? Please use a scale of one to ten, where one is poor, and ten is excellent.

Base: The shopping public

| | Jan. 1988 Base | Average Rating (1 to 10 Scale) | Percentage Rating Supermarket 9 or 10 |
|---|---|---|---|
| | | | % |
| Total | 1019 | 8.1 | 42 |
| *Sex* | | | |
| Men | 402 | 7.8 | 30 |
| Women | 617 | 8.2 | 43 |
| Working | 345 | 7.9 | 36 |
| Nonworking | 269 | 8.5 | 53 |
| *Type of Household* | | | |
| With Children | 453 | 8.0 | 40 |
| No Children | 560 | 8.2 | 42 |
| *Size of Household* | | | |
| 1 | 158 | 8.3 | 46 |
| 2 | 360 | 8.1 | 40 |
| 3 | 181 | 8.2 | 44 |
| 4 | 194 | 8.2 | 43 |
| 5 or more | 122 | 7.7 | 32 |
| *Age* | | | |
| 18-24 | 82 | 7.7 | 27 |
| 25-39 | 407 | 7.9 | 36 |
| 40-49 | 162 | 8.0 | 41 |
| 50-64 | 214 | 8.4 | 46 |
| 65 and older | 128 | 8.7 | 60 |
| *Income* | | | |
| $7,500 or less | 55 | 8.6 | 53 |
| $7,501-$15,000 | 137 | 8.1 | 44 |
| $15,001-$25,000 | 221 | 7.9 | 37 |
| $25,001 or more | 529 | 8.1 | 40 |

## Changes in Supermarket Service

Table 39 shows that almost all shoppers (91 percent) perceive the service at their supermarket to have improved or remained constant over the last year or two. About half (51 percent) of all shoppers believe the service has remained the same, a large proportion (40 percent) feel the service has improved, and only 7 percent feel the service has declined. Across different categories of shoppers, reaction to changes in supermarket service is substantially similar. As noted in Chapter 1, shoppers' overall satisfaction with their supermarket is strongly affected by perceived improvements in the service provided to customers.

**Table 39** **Changes in Supermarket Service**

Q: Over the past year or two, would you say that the service provided by your supermarket declined, remained the same or improved?

Base: The shopping public

| | | Jan. 1988 Base | Improved | Remained the Same | Declined | Don't Know/ No Response |
|---|---|---|---|---|---|---|
| Total | % | **1019** | 40 | 51 | 7 | 2 |
| *Sex* | | | | | | |
| Men | % | **402** | 42 | 50 | 7 | 1 |
| Women | % | **617** | 40 | 51 | 7 | 2 |
| Working | % | **345** | 39 | 52 | 7 | 2 |
| Nonworking | % | **269** | 41 | 49 | 7 | 2 |
| *Type of Household* | | | | | | |
| With Children | % | **453** | 43 | 48 | 7 | 2 |
| No Children | % | **560** | 39 | 53 | 7 | 2 |
| *Size of Household* | | | | | | |
| 1 | % | **158** | 49 | 48 | 3 | * |
| 2 | % | **360** | 35 | 55 | 9 | 2 |
| 3 | % | **181** | 44 | 45 | 9 | 3 |
| 4 | % | **194** | 39 | 53 | 5 | 3 |
| 5 or more | % | **122** | 45 | 47 | 7 | 1 |
| *Age* | | | | | | |
| 18-24 | % | **82** | 46 | 47 | 2 | 5 |
| 25-39 | % | **407** | 42 | 50 | 5 | 3 |
| 40-49 | % | **162** | 35 | 54 | 9 | 1 |
| 50-64 | % | **214** | 41 | 48 | 11 | * |
| 65 and older | % | **128** | 43 | 50 | 6 | 0 |
| *Income* | | | | | | |
| $7,500 or less | % | **55** | 38 | 57 | 5 | 0 |
| $7,501-$15,000 | % | **137** | 47 | 41 | 9 | 4 |
| $15,001-$25,000 | % | **221** | 45 | 45 | 7 | 3 |
| $25,001 or more | % | **529** | 38 | 54 | 7 | 1 |

*Less than 0.5 percent.

# CHAPTER 6

## NEW PRODUCTS AND SERVICES

### Availability

For the third consecutive year, in 1988 *Trends* reviewed the availability of new products and services in the supermarket (see Table 40). Overall, availability remained relatively stable, with only a few items showing minor increases or decreases. Significant increases occurred among the proportions of shoppers whose supermarkets carry or have "food products designed especially for microwave cooking," "food catering," "video rentals," and "postage stamps." Significant decreases occurred among shoppers whose supermarkets carry "unpackaged or bulk food" and "fresh, not frozen pizza."

As a reflection of the expanded range of products now carried by many supermarkets, several items were added to the list of new products and services in 1988. Of the added items, "photo finishing" was identified by half (50 percent) of all shoppers as available at their supermarkets, over a fourth (27 percent) identified "prescription drug counter," and one shopper in eight (13 percent) identified "fresh juice bar." Slightly more than one shopper in 20 (6 percent) stated that their supermarket carries "ice cream shop (not packaged) ice cream."

Of the 17 items included in the investigation, those that are least available in supermarkets are "ice cream shop (not packaged) ice cream" (6 percent), "home shopping and delivery service for groceries" (7 percent) and "fresh juice bar" (13 percent). Those that are carried most commonly include "food products designed especially for microwave cooking" (93 percent), "unbranded or generic products" (85 percent) and "delicatessen or other carry-out food items" (80 percent). One may note that the availability of unbranded or generic products is considered among the least important factors when a shopper selects a supermarket (see Table 1).

## Table 40 Availability of New Products and Services

Base: The shopping public

Q: Thinking about the supermarket where you do most of your shopping, does it carry or have (READ EACH ITEM)?

| | | Jan. 1986 | Jan. 1987 | Jan. 1988 | | |
|---|---|---|---|---|---|---|
| | | Yes | Yes | Yes | No | Not Sure |
| Food products designed especially for microwave cooking | % | 86 | 89 | 93 | 4 | 3 |
| Unbranded or generic products | % | 87 | 86 | 85 | 9 | 6 |
| Delicatessen or other carryout food items | % | 74 | 78 | 80 | 20 | 1 |
| Partially prepared foods that require less time to prepare at home | % | 63 | 78 | 77 | 17 | 6 |
| Gourmet or specialty foods | % | 70 | 72 | 74 | 20 | 5 |
| Unpackaged or bulk food | % | 54 | 61 | 56 | 39 | 5 |
| Photo finishing | % | x | x | 50 | 44 | 6 |
| Fresh, not frozen pizza | % | 47 | 52 | 47 | 47 | 6 |
| Food catering | % | 38 | 41 | 45 | 46 | 8 |
| Video rentals | % | x | 38 | 44 | 51 | 6 |
| A salad bar** | % | 51 | 37 | 40 | 58 | 1 |
| Automatic teller machines | % | 33 | 32 | 35 | 60 | 5 |
| Postage stamps | % | x | 29 | 34 | 51 | 16 |
| Prescription drug counter | % | x | x | 27 | 72 | 1 |
| Fresh juice bar | % | x | x | 13 | 83 | 4 |
| Home shopping and delivery service for groceries | % | 7 | 5 | 7 | 82 | 11 |
| Ice cream shop (not packaged) ice cream | % | x | x | 6 | 93 | 1 |

x = Not asked.
**In 1986, shoppers were asked if their supermarket carried "items from a salad bar." In 1987, shoppers were asked if their supermarket had "a salad bar."
May not add up to 100 percent due to rounding.

## Using New Products and Services

As in earlier years, shoppers who said their supermarket has a particular product or service were asked how frequently they use it (see Table 41). The products and services used most include:

- Delicatessen or other carryout food items (27 percent).
- Prescription drug counter (26 percent).
- Food products designed especially for microwave cooking (25 percent).
- Postage stamps (23 percent).
- Automatic teller machines (23 percent).

The only item never used by more than half of all shoppers is food catering (60 percent).

Over the past year, the only instances where notably smaller proportions of responding shoppers said they use an item frequently involved postage stamps (7 percentage point decrease), unpackaged or bulk food (5 point decrease) and gourmet or specialty foods (5 point decrease).

**Table 41** **Shoppers' Use of New Products and Services**

Base: The shopping public who say their supermarkets have the product or service

Q: How often do you use or purchase (READ EACH ITEM)?
Would you say frequently, occasionally, rarely or never?

| | | Jan. 1986 | Jan. 1987 | Jan. 1988 | | | | |
|---|---|---|---|---|---|---|---|---|
| | | Frequently | Frequently | Frequently | Occasionally | Rarely | Never | Not Sure |
| Delicatessen or other carryout food items | % | 25 | 28 | 27 | 46 | 15 | 12 | 0 |
| Prescription drug counter | % | x | x | 26 | 22 | 12 | 39 | * |
| Food products designed especially for microwave cooking | % | 18 | 22 | 25 | 39 | 13 | 23 | * |
| Postage stamps | % | x | 30 | 23 | 29 | 11 | 36 | * |
| Automatic teller machines | % | 33 | 24 | 23 | 13 | 13 | 49 | 2 |
| Fresh juice bar | % | x | x | 18 | 33 | 14 | 36 | 0 |
| Unbranded or generic products | % | 16 | 19 | 17 | 33 | 22 | 28 | 1 |
| Partially prepared foods that require less time to prepare at home | % | 14 | 16 | 16 | 42 | 25 | 16 | * |
| Unpackaged or bulk food | % | 22 | 20 | 15 | 40 | 22 | 22 | 1 |
| Photo finishing | % | x | x | 15 | 26 | 13 | 44 | 1 |
| Video rentals | % | x | 11 | 14 | 19 | 11 | 55 | * |
| Ice cream shop (not packaged) ice cream | % | x | x | 13 | 42 | 13 | 31 | 1 |
| A salad bar** | % | 20 | 13 | 12 | 31 | 15 | 41 | * |
| Fresh, not frozen pizza | % | 6 | 11 | 10 | 36 | 25 | 28 | 0 |
| Gourmet or specialty foods | % | 8 | 13 | 8 | 43 | 27 | 21 | * |
| Home shopping and delivery service for groceries | % | 10 | 3 | 3 | 16 | 5 | 76 | 0 |
| Food catering | % | 3 | 2 | 2 | 15 | 22 | 60 | * |

x = Not asked.
*Less than 0.5 percent.
**In 1986, shoppers were asked if their supermarket carried "items from a salad bar." In 1987, shoppers were asked if their supermarket had "a salad bar."
May not add up to 100 percent due to rounding.

## Potential Use of New Products and Services

In instances where supermarkets do not carry a particular item, shoppers were asked how frequently they would use the item if it were available (see Table 42). Items named "frequently" by the largest proportions of would-be shoppers include "postage stamps" (22 percent), "delicatessen or other carryout food items (22 percent) and "ice cream shop (not packaged) ice cream" (16 percent). Since 1987, the only significant changes in anticipated usage occurred for "delicatessen or other carryout food items" (4 percentage point increase) and "postage stamps" (5 percentage point decrease).

As in earlier years, in most instances the proportions who estimate that they would use an item frequently are less than the proportions who actually use them (see Table 41). The most notable gaps occur for "food products designed especially for microwave cooking" (18 percentage point gap), "prescription drug counter" (12 point gap), "unbranded or generic products" (9 point gap) and "automatic teller machines" (8 point gap). This indicates that the potential acceptance for these products and services is likely to be greater than Table 42 suggests.

### Table 42 Potential Use of New Products and Services

Base: The shopping public who say their supermarkets do not have the product or service

Q: If your supermarket carried or had (READ EACH ITEM), how often do you think you would use or purchase it? Would you say frequently, occasionally, rarely or never?

| | | Jan. 1986 | Jan. 1987 | Jan. 1988 | | | | |
|---|---|---|---|---|---|---|---|---|
| | | Frequently | Frequently | Frequently | Occasionally | Rarely | Never | Not Sure |
| Postage stamps | % | x | 27 | 22 | 32 | 16 | 29 | 1 |
| Delicatessen or other carryout food items | % | 13 | 18 | 22 | 45 | 17 | 15 | 1 |
| Ice cream shop (not packaged) ice cream | % | x | x | 16 | 36 | 19 | 28 | 1 |
| Automatic teller machines | % | 15 | 14 | 15 | 24 | 19 | 40 | 2 |
| Prescription drug counter | % | x | x | 14 | 31 | 16 | 37 | 1 |
| Partially prepared foods that require less time to prepare at home | % | 8 | 13 | 13 | 40 | 22 | 25 | * |
| Fresh juice bar | % | x | x | 13 | 32 | 19 | 34 | 1 |
| A salad bar** | % | 8 | 11 | 12 | 31 | 22 | 35 | * |
| Fresh, not frozen pizza | % | 7 | 10 | 12 | 34 | 21 | 32 | 1 |
| Video rentals | % | x | 9 | 12 | 28 | 14 | 45 | 1 |
| Home shopping and delivery service for groceries | % | 8 | 11 | 11 | 19 | 19 | 49 | 1 |
| Unpackaged or bulk food | % | 9 | 11 | 10 | 30 | 21 | 37 | 1 |
| Photo finishing | % | x | x | 9 | 33 | 18 | 39 | 1 |
| Gourmet or specialty foods | % | 4 | 8 | 8 | 37 | 29 | 25 | 0 |
| Unbranded or generic products | % | 8 | 6 | 8 | 31 | 20 | 36 | 3 |
| Food products designed especially for microwave cooking | % | 7 | 16 | 7 | 29 | 17 | 47 | 0 |
| Food catering | % | 3 | 4 | 2 | 14 | 22 | 61 | * |

x = Not asked.
*Less than 0.5 percent.
**In 1986, shoppers were asked if their supermarket carried "items from a salad bar." In 1987, they were asked if their supermarket had "a salad bar."
May not add up to 100 percent due to rounding.

# METHODOLOGY

## Selection of the Sample

The data for this survey were collected from 1,019 telephone interviews conducted in January 1988. The households were selected by a procedure known as random digit dialing (RDD). This procedure ensures the inclusion of individuals with unlisted or not yet listed telephone numbers, as well as those with listed numbers, and thus closely approximates the total U.S. population.

Each household selected was screened by the following three criteria:

- Male or female head of household.
- Having primary or equally shared responsibility for food shopping.
- Having shopped for groceries in the past two weeks.

Only included were heads of households who have primary or equally shared responsibility for food shopping and who had shopped for groceries in the past two weeks.

The sample was controlled to consist of 60 percent female heads of households and 40 percent male heads of households in order to increase the reliability of the male shopper sample. The sample was then weighted to an 80 percent female/20 percent male ratio to maintain comparability with previous studies in the *Trends* series. Aside from this stratification and weighting by sex, the sample is a nationwide cross-section of shoppers. Therefore, all subpopulation percentages are projectable to the U.S. shopping public as a whole. A profile of the total sample is shown in Table 43.

**Table 43** **Demographic Profile of Supermarket Shoppers: 1988**

Base: The shopping public

| | Number in Sample | Unweighted Percentage in Sample | Weighted Percentage in Sample |
|---|---|---|---|
| | | % | % |
| Total | 1019 | 100 | 100 |
| *Sex* | | | |
| Men | 402 | 39 | 20 |
| Women | 617 | 61 | 80 |
| Working | 345 | 34 | 45 |
| Nonworking | 269 | 26 | 35 |
| *Type of Household* | | | |
| With children | 453 | 44 | 47 |
| Two wage-earner | 362 | 36 | 36 |
| *Age* | | | |
| 18-24 | 82 | 8 | 8 |
| 25-39 | 407 | 40 | 40 |
| 40-49 | 162 | 16 | 16 |
| 50-64 | 214 | 21 | 22 |
| 65 and over | 128 | 13 | 12 |

## Table 43 *(Continued)* Demographic Profile of Supermarket Shoppers: 1988

Base: The shopping public

| | Number in Sample | Unweighted Percentage in Sample | Weighted Percentage in Sample |
|---|---|---|---|
| | | % | % |
| *Income* | | | |
| $7,500 or less | 55 | 5 | 6 |
| $7,501-$15,000 | 137 | 13 | 14 |
| $15,001-$25,000 | 221 | 22 | 21 |
| $25,001 and over | 529 | 52 | 51 |
| *Race* | | | |
| White | 896 | 88 | 88 |
| Black | 81 | 8 | 8 |
| *Ethnicity* | | | |
| Hispanic | 46 | 5 | 5 |
| Nonhispanic | 949 | 93 | 93 |
| *Marital Status* | | | |
| Single/separated divorced/widowed | 320 | 32 | 30 |
| Married | 695 | 68 | 70 |
| *Education* | | | |
| High school or less | 499 | 49 | 52 |
| Some college/college grad | 512 | 50 | 47 |
| *Population Density* | | | |
| Metropolitan | | | |
| 1 million or over | 393 | 39 | 37 |
| Under 1 million | 350 | 34 | 35 |
| Nonmetropolitan | 276 | 27 | 27 |
| *Region** | | | |
| East | 260 | 26 | 26 |
| Midwest | 277 | 27 | 27 |
| South | 310 | 30 | 31 |
| West | 172 | 17 | 16 |

**East includes* Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont and West Virginia.

*Midwest includes* Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin.

*South includes* Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas and Virginia.

*West includes* Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington and Wyoming.

Note: Percentages may add up to less than 100 percent as a result of nonresponse.

## Sampling Error

It is important to note that survey results are subject to sampling error, i.e., the difference between obtained results and those that would be obtained by studying the entire population. The size of this error varies with the size of the sample and with the percentage of respondents giving a particular answer. Table 44 shows the range of error for samples of four different sizes and at different percentages of response.

This table can be used to determine the approximate sampling errors associated with results presented in this report. An example may serve to illustrate this process.

As shown in Table 22 of this report, 37 percent of those surveyed this year take packaged meat available, rather than ask for a different cut pretty much every time they shop. This percentage is based on the total sample of 1,019 shoppers. From the table below, the sampling error associated with a 40 percent response for a sample of 1,000 is plus or minus 3.0 percentage points. Applying this sampling error to the 37 percent response in Table 22, the true proportion of shoppers who take packaged meat should be no less than 34 percent, and no more than 40 percent.

Aside from knowing the sampling error of any given finding, one might also be interested in whether the differences between certain percentage figures are a likely result of sample variation or due to real differences in the shopping population. For example, in Table 21 there is a 14 percentage point difference between the percentage of working women who think saving time in the supermarket is very important and the percentage of women not working outside the home who feel this way. Although this 14 percentage point difference seems large, it could be due to sampling error. To determine whether or not this is a true difference, one needs to consider the number of people responding to each question, as well as the particular percentages reported. In general, the larger the sample size, the less likely it is that a reported difference will be due to sampling error.

In Table 45, the minimum differential percentage that must occur to be considered real is shown for varying sample sizes and varying percent-responses.

Taking the previous example from Table 21, 345 working women were asked how important it is to them to save time in the supermarket, of whom 44 percent said "very important." A total of 269 women not working outside the home were asked the same question, of whom 30 percent said "very important." Both of these sample sizes are closest to the 300 sample size row of the table. The two percentages are closest to the 40 percent or 60 percent column.

From the table, the minimum difference between percentages that would be considered not due to sampling error is 8 percentage points. Because the difference between 44 percent and 30 percent is greater than this minimum, one can safely assume that more working women than women not working outside the home view saving time as very important.

**Table 44** **Sampling Error (+/-) at 95 Percent Confidence Level for Samples of Four Different Sizes**

| Percentage Response | Size of Sample | | | |
|---|---|---|---|---|
| | 1000 | 600 | 400 | 100 |
| | % | % | % | % |
| 10 (90) | 1.9 | 2.4 | 2.9 | 5.9 |
| 20 (80) | 2.5 | 3.2 | 3.9 | 7.8 |
| 30 (70) | 2.8 | 3.7 | 4.5 | 9.0 |
| 40 (60) | 3.0 | 3.9 | 4.8 | 9.6 |
| 50 (50) | 3.1 | 4.0 | 4.9 | 9.8 |

## Table 45 Sampling Error of Difference between Proportions

| Approximate Sample Size of Two Groups Asked Question on Which Survey Results Are Based | Sampling Tolerances (at 95% Confidence Level) to Use in Evaluating Differences between Two Percentage Results | | | | |
|---|---|---|---|---|---|
| | Survey Percentage Results at 10% or 90% | Survey Percentage Results at 20% or 80% | Survey Percentage Results at 30% or 70% | Survey Percentage Results at 40% or 60% | Survey Percentage Results at 50% |
| 1,000 vs. 1,000 | 3 | 4 | 4 | 4 | 4 |
| 500 | 3 | 4 | 5 | 5 | 5 |
| 300 | 4 | 5 | 6 | 6 | 6 |
| 200 | 5 | 6 | 7 | 7 | 8 |
| 100 | 6 | 8 | 9 | 10 | 10 |
| 500 vs. 500 | 4 | 4 | 6 | 6 | 6 |
| 300 | 4 | 6 | 7 | 7 | 7 |
| 200 | 6 | 7 | 8 | 8 | 8 |
| 100 | 7 | 9 | 10 | 11 | 11 |
| 300 vs. 300 | 5 | 6 | 7 | 8 | 8 |
| 200 | 5 | 7 | 8 | 9 | 9 |
| 100 | 7 | 9 | 10 | 11 | 11 |
| 200 vs. 200 | 6 | 8 | 9 | 10 | 10 |
| 100 | 7 | 10 | 11 | 12 | 12 |
| 100 vs. 100 | 8 | 11 | 13 | 14 | 14 |